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ABSTRACT

This handbook is designed to assist special education advocates in developing the capacity to mount an effective advocacy campaign at the state and federal levels. It is divided into the following four separate training modules: (1) "Introduction to Advocacy"; (2) "Understanding the Governmental Process"; (3) "Changing Public Policy"; and (4) "Building Coalitions and Networks." Modules are organized as self-contained sets of training materials. Each module includes background information on the topic, suggested workshop or training session activities, and ideas for applications. The handbook describes the history and evolution of current concerns and explains successful advocacy efforts upon which to draw. It discusses the basic tools for advocacy, which include knowledge of the legislative or regulatory process, effective communication skills, and effective access to the media. It illuminates what motivates both elected and nonelected officials, what catches their attention, and what makes them respond. The handbook also offers advice on building coalitions, framing key issues and packaging important information, and understanding how to use the media as a tool to advance a cause. A glossary and several masters for overhead transparencies conclude the handbook. (Contains 11 references.) (CR)

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ED 441 323

Political Advocacy Handbook

Activating Grassroots Involvement

N.D. Safer

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The Council for Exceptional Children

Department of Public Policy

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Note: The references to either a male or female in this handbook are meant to include both sexes.

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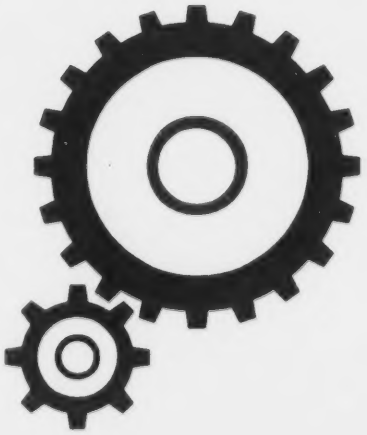


Introduction

Political Advocacy Handbook

Activating Grassroots Involvement

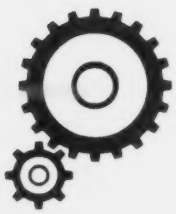
Advocacy has long been a tradition in the special education profession. As special education professionals, we have all been advocates at some level. Words of support for improving educational results for children and youth with exceptionalities, whether stated in one's school or presented in a public arena, constitute advocacy. Over the years, we have a track record of making our words count.

The process of securing rights that the average citizen takes for granted for individuals with disabilities, has, in many cases, required long, hard fought battles at the federal, state, and local levels. Over the years, teachers, administrators, families, and others committed to ensuring that individuals with disabilities are entitled to a free and appropriate public education, have stood together, spoken out, and influenced policy makers to pass legislation that has resulted in improved educational results for all children and youth in our nation. The continued existence of federal programs for children with gifts and talents can also be attributed to successful advocacy.

While we have come a long way in advancing education for individuals with exceptionalities, we cannot afford to rest on our laurels. Indeed, as resources become tighter and as the voices of our political enemies grow louder, we will need to increase our vigilance. And, given the shift in political climate that we witnessed in 1994, we should use our history of successful grassroots advocacy work to build an even stronger foundation.

During the 1994 U.S. federal elections, the rules for advocacy changed. Along with the slogans to put the "power" for decision making back into the hands of the states, U.S. Congressional leaders and aides began subscribing to a new practice that was designed to limit the input from staff of national organizations. Simply put, the new Congress insisted that they no longer wanted to hear from lobbyists, but that they wanted to hear instead from their constituents themselves.

Obviously, there are many far-reaching implications of this shift in how Congress is accessed and influenced. Perhaps the most important implication lies at the personal level and can be summarized in one question—if YOU were contacted to offer a legislator your expertise on a complex special education issue, instead of CEC Headquarters staff, would you be comfortable getting the information and making sure that the legislator used the information to advance education and services for children and youth with exceptionalities?



CEC wants you to feel confident that you will be able to answer that question with a resounding "yes!" Moreover, CEC wants you to be able to

expand your role as a field leader in activating grassroots involvement. Now, more than ever before, it is critical that local networks become active and assertive in advocating for the educational rights of children and youth with exceptionalities, as well as our own rights in the school and in the classroom. The profession and the children who it serves need strong voices in every congressional and school district—voices who are organized and willing to become involved. Without concerted effort, the field of special education stands to lose future opportunities for growth and improvement; but even more importantly, programs and accompanying monies that we have won for our students in the past will be left vulnerable to the whims of naysayers and political enemies.

CEC believes that educators, related service providers, and families are the best advocates—after all, they have first-hand experience of what it takes to ensure high quality education for individuals with exceptionalities. Special educators and families, as well as those individuals committed to improving education for children and youth with exceptionalities, know what is needed, as well as what will hinder progress. Elected officials need to hear these informed voices whenever they set out to make policy. It is our professional responsibility to make sure that policymakers hear us.

Purpose of the Handbook

The Political Advocacy Handbook is designed to assist special education advocates in developing the capacity within their local divisions, chapters and federations to mount an advocacy campaign. It assumes that within each locality, there are committed individuals—including special educators, families, and concerned others—who can be called upon to communicate effectively with elected policymakers at national, state, and local levels. With ample knowledge and skills, these advocates can significantly affect policy.

To this end, the handbook is organized as a facilitator's guide—that is, it assumes that you will be willing to assist special educators and other concerned individuals in learning enough about advocacy to be effective in influencing policy makers. Your goal is to prepare a cadre of grassroots activists who are committed to actively advocating for the improvement of special education.

To assist you with these goals, the Department of Public Policy at CEC has developed this **Political Advocacy Handbook**. We have organized its contents to correspond with what we know from our public policy work about how advocates mobilize advocacy change efforts:

- Advocates frame the policy issue in a way that promotes their views and preferred solution.
- Advocates understand how the policy process works and use that knowledge in shaping how they introduce and promote their ideas.
- Advocates know how to develop and choose particular strategies to build support for their ideas.
- Advocates build networks and coalitions to draw support from influential stakeholders.

As a special education professional and/or advocate, you already use elements of professional lobbying in your every day life. For example, every time a teacher recommends a new strategy or approach for meeting the needs of an individual child in an individualized education plan (IEP), that teacher is advocating for better student results. Whenever the family insists that the child needs certain assistive technology devices to navigate the school environment, that family is advocating for better educational services. Or, when an administrator presents a proposal to the central office that asks for release time for teacher collaboration, that administrator is advocating for system changes that support teaching and learning.

The Political Advocacy Handbook takes you to the next step in building your advocacy skills by providing you with the means

to share your knowledge and skills with others involved in policymaking work. It guides you in transferring your skills to others—individuals who you can call upon to participate in the policy making arena.

The **Political Advocacy Handbook** is designed to help individuals train others to become advocates at the state and federal levels. While the content of the handbook is focused primarily on mounting an advocacy campaign at these levels, most likely you will find that it takes little to adapt the strategies to the local level. For example, there are a number of "local" issues, which have their roots in state and federal policies—e.g., funding for special education, discipline and expulsion, testing, or elimination of gifted education programs. Drawing attention to how the issues and strategies manifest themselves at national, state, and local levels will help enable your participants to see how the basic advocacy skills can be generalized across settings.

The Council for Exceptional Children

Committed to Advocacy and Public Policy

The Council for Exceptional Children (CEC), the largest professional organization representing those individuals dedicated to improving the educational outcomes for children and youth with disabilities and those who are gifted, is committed to providing grassroots advocacy information directly to CEC members. CEC members are instrumental in shaping special education policy and have been for over 75 years. The CEC name carries a great deal of clout in state capitals and in Washington, DC, but its name alone cannot ensure passage of positive and progressive special education policies. Our success has always and will continue to rely on our highly committed and motivated members to press for meaningful special education policies at the grassroots level.

According to the CEC Strategic Plan, "public policies at all levels of government are the underlying framework in serving individuals with exceptionalities and continually renewing our profession." As such, CEC has a proud history as a force in the federal policy arena. CEC has also sought to empower its members to be a force for meeting the policy challenges in the communities in which they live and work.

The **Political Advocacy Handbook** is a direct outgrowth of CEC's ongoing commitment to strengthen the abilities of CEC members in all aspects of government and public policy through information, training, and coordination of common agendas. Staff in the Department of Public Policy at CEC Headquarters are always available to assist you in your advocacy efforts.

Inside the Political Advocacy Handbook

The **Political Advocacy Handbook** will help you channel your drive, strength, commitment, and knowledge of the special education field into effective advocacy efforts. With the **Political Advocacy Handbook** your ability to expand the special education advocacy network will be enhanced.

No publication can serve as a cookbook for public policy. However, we have tried to organize the topics around those that are most basic to political advocacy work. The **Political Advocacy Handbook** is organized as four separate training modules. The topics for each module are:

- Module 1: Introduction to Advocacy
- Module 2: Understanding the Governmental Process
- Module 3: Strategies for Influencing Policy Makers
- Module 4: Building Networks and Coalitions

As you can tell by the topics, each module builds on the knowledge covered in the previous module.

Modules are organized as self-contained sets of training materials. Each module includes:

- background information on the topic (in some cases, you will treat this as a review)
- suggested workshop or training session activities
- ideas for application
- appendices containing blackline masters for making overheads and handouts

There is no prescribed order for activities or time frame for conducting sessions. We have developed a suggested agenda in each module which you can use as a guide when designing your own. To facilitate your use of materials, we have organized all suggested activities and content as follows:

- ***Warm-Up Activities:*** These are designed to activate the participants' prior knowledge about the topic, to orient them to the session, and to motivate their involvement.
- ***Content Presentation:*** Suggested topics and corresponding overheads are included.
- ***Application Activities:*** These activities are designed to assist participants in applying their knowledge and skills. Some activities can be completed in an extended or follow-up session; others will require some field work.

We have included a variety of activities, knowing that individual facilitator preferences will vary. Feel free to use any of these activities—or supplement them with your own favorites.

Unless otherwise noted, the basic information in each module is designed to be delivered in a one hour to one-and-one-half hour session. Of course, given more time, participants in your session will have a better opportunity to build skills and apply knowledge. Permission is granted to make copies of handouts and overheads for workshop usage.

Using the Handbook

It is our goal that you will use the information contained in the **Political Advocacy Handbook** in sessions and/or workshops in your locality. We recommend that you think of Module 1 as being a standard introductory session that can be included in local chapter meetings, sessions at state conferences, regional meetings, and other gatherings. The information and skill building material found in the remaining modules requires additional time. For these, we recommend you organize weekly meetings, a half day training workshop, a strand at a state conference, or other similar event.

How you deliver your training will depend on what opportunities you have in your locality. As a point of reference, it is a good idea to contact the Federation or Subdivision President and other CEC leaders (e.g., chapter presidents) to invite their ideas for dissemination.

Finally, we have included a glossary of terms in *Table 1*. These terms will be used throughout the entire handbook.

Planning the Workshop

Delivering a successful information and/or workshop session requires careful planning. Once you have a date, time and place to hold the session, your task is to assure that the following things have been handled:

- ***Publicity:*** People need to know about your session. Make sure that someone (or yourself) has sent out flyers, posted e-mail messages, and/or listed the session in an appropriate newsletter.
- ***Room:*** Check out the room. How many people can comfortably fit into the room? How will seats be arranged? Will audio-visual equipment be available? Do you need to order audio-visual equipment or bring your own?
- ***Materials:*** Be sure that all materials are prepared for the session or workshop.
  - Organize your overheads, training supplies, and any activity sheets.
  - Prepare a master packet of handouts for participants. If you are using overheads, participants usually find it helpful to have copies of them.
  - Have a way to collect everyone's name,

address, and phone numbers for later follow-up. Have blank name badges on hand.
- Encourage your local CEC chapter to have a display of membership information on hand.

If you are planning to meet over a meal hour, let the participants know this in advance. Will people be expected to "brown-bag" or will you supply refreshments? If people are expected to go out to lunch, let them know this also.

Moving Ahead

We are at the crossroads of a wonderful opportunity to increase our strength and maximize our effectiveness in advancing the education of children and youth with disabilities. But it will take a lot of hard work and commitment.

As a leader in special education, you know that advocacy is important to our very existence. Without advocacy and targeted change efforts over the years, our children and teachers most likely would not be afforded the same opportunities that they have today. Use the Political Advocacy Handbook to build the capacity within all concerned individuals to develop and sustain a positive voice in public policy affairs.

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Table 1. Glossary of Legislative Terms

Act	Technically, the designation of a bill after it has passed one house of Congress. Also used as a synonym for law. The term for legislation that has passed both houses of Congress and has been signed by the President or passed over his veto.
Amendment	Proposal of a Congressman to alter the language or stipulations in a bill or act. It is usually printed, debated, and voted upon in the same manner as a bill.
Appropriations Bill	Permits the expenditure of the monies approved by an authorization bill, but usually not to the total permissible under the authorizing legislation. An appropriations bill originates in the House and normally is not acted on until its authorization measure is enacted.
Authorization Bill	Legislation setting up or continuing programs; sets general aims and purposes and may set a ceiling for funding. Must be enacted before appropriations bill is passed. Occasionally, once prior authorization has run out, an appropriation may be made before a program is reauthorized.

Table 1 (continued). Glossary of Legislative Terms

Bill	Legislative proposal introduced in either house (until it has been passed by that house). Designated HR (House of Representatives) or S (Senate) according to the house in which it originates and by a number assigned in the order in which it is introduced.
Budget	Document sent to Congress by the President in January of each year estimating revenues and expenditures for the ensuing fiscal year.
Calendars	Arrangements for scheduling legislative business.
Clean Bill	After a committee has considered and revised a bill, it may rewrite it incorporating its amendments into a new or "clean bill." This bill is given a new number and is the committee's best judgment of superior sections in all versions.
Closed Rule	(House) prohibits the offering of amendments, thus requiring that the bill be accepted or rejected as reported by committee.
Cloture	A process by which debate can be ended in the Senate. A motion for cloture requires 16 senators' signatures for introduction and support of two-thirds of those present and voting.
Committee	A subdivision of the House or Senate which prepares legislation for action by the parent chamber or makes investigations as directed by the parent chamber. There are several types of committees. Most standing committees are divided into subcommittees, which study legislation, hold hearings, and report their recommendations to the full committee. Only the full committee can report legislation for action by the House or Senate.
Committee of the Whole	When the House sits as one committee to consider legislation reported by a standing committee before it goes to the floor; the committee debates and amends legislation. Requires only 100 members for a quorum.
Committee Report	Written explanation and justification for recommendations submitted by committee to full chamber after the committee has scrutinized and decided to favorably report a bill. Used by courts, executive departments, and the public as a source of information on the purpose and meaning of a law.
Conference Committee	A committee made up of members from both houses; purpose is to iron out differences between House and Senate versions of a bill.
Congressional Record	Daily record of the proceedings and debates of the Senate and House.

Table 1 (continued). Glossary of Legislative Terms

Continuing Resolution	When a fiscal year begins and Congress has not yet enacted all the regular appropriation bills for that year, it passes a joint resolution "continuing appropriations" for government agencies at rates generally based on its previous year's appropriations.
Expenditures	The actual spending of money as distinguished from the appropriation of it. Expenditures are made by the disbursing officers of the administration; appropriations are made only by Congress. The two are rarely identical in any fiscal year; expenditures may represent money appropriated one, two, or more years previously.
Hearings	Committee session for hearing witnesses. At hearings on legislation, witnesses usually include floor spokespersons for their party, who are elected by party caucus.
Pigeonhole	Shelving a bill without a final vote; usually refers to blockage by a committee; allows a bill to die by failure of a committee to act.
Privileged Bills	(House) bills that have precedence over normal order of business and do not require Rules Committee action; reports from Committee on Appropriations on general appropriations bills and reports from Committee on Ways and Means on bills raising revenue are privileged bills.
Quorum	Number of members who must be present to conduct business; in the House it is 218 and in the Senate it is 51.
Ranking Member	Member of a committee who has more seniority on the committee than any other member of his party. Usually used in reference to the most senior minority party member.
Reconciliation	A process Congress uses to make its tax and spending legislation conform with the targets established in the budget resolution. The budget resolution may contain reconciliation instructions directing certain congressional committees to achieve deficit reduction through changes in tax or entitlement spending programs under their jurisdiction. Legislation to implement the reconciliation instructions is usually combined in one comprehensive bill.
Report	Both a verb and a noun, as a congressional term. A committee that has been examining a bill referred to it by the parent chamber (House or Senate) "reports" its findings and recommendations to the chamber when the committee returns the measure. The process is called "reporting" a bill. A "report" is the document setting forth the committee's explanation of its action. House and Senate reports are numbered separately and are designated S. Rept. or H. Rept. Conference reports are numbered and designated in the same way as regular committee reports. Most reports favor a bill's passage. Adverse reports are occasionally submitted, but more often, when a committee disapproves a bill, it simply fails to report it at all. When a committee report is not unanimous, the dissenting committee members may file a statement of their views, called minority views and referred to as a minority report. Sometimes a bill is reported without recommendation.

Table 1 (continued). Glossary of Legislative Terms

Rescission	An item in an appropriations bill rescinding, or canceling, funds previously appropriated but not spent. Also, the repeal of a previous appropriation by the President to cut spending, if approved by Congress under procedures in the Budget and Impoundment Control Act of 1974.
Rider	An amendment proposing substantive legislation attached to another bill.
Rules Committee (House only)	A committee which determines what bills will be considered by the entire House, and the procedures for such consideration.
Seniority	Refers to length of uninterrupted service in Congress and specifically on a committee; criterion usually used for determining committee chairmanships.
Session	Normally, each Congress consists of two sessions, usually beginning in January and ending when Congress adjourns for the year.
Standing Committee	Committee whose existence is permanent and continuing from one Congress to the next; there are 20 in the House and 17 in the Senate.
Subcommittee	Smaller subject-matter divisions of a committee; facilitates specialization and division of labor.
Supplemental Appropriations	Normally are passed after the regular (annual) appropriations bills, but before the end of fiscal year to which they apply. Also referred to as "deficiencies."
Suspension of the Rules	In the House a two-thirds majority may suspend the rules and bring a bill directly to the floor; in the Senate, only a majority vote is needed.
Teller Votes	(House) Votes taken in Committee of the Whole by counting congress members for or against a measure as they walk down the aisle; (until the Legislative Reorganization Act of 1970, there was not a provision for recording teller votes).
Unanimous Consent	Usual way of conducting business in the Senate; after morning hour, majority leader asks unanimous consent to consider pending legislation; such requests are rarely objected to; also used in both houses in lieu of a vote on noncontroversial measures.
Veto	Action by the President if he doesn't approve of a bill or joint resolution; he returns it with his objections to the house of origin and the bill may be reconsidered; must receive approval of two-thirds of both chambers to become law. When Congress has adjourned, the President may pocket veto a bill by refusing to sign it.

Table 1 (continued). Glossary of Legislative Terms

Whip	A member chosen by party caucus as an assistant to the floor leader; job is to keep in touch with all members of his party, discover their voting intentions, and get them to the floor for a vote.

Module 1 ONE

Introduction to Advocacy

What is advocacy? What does advocacy have to do with professional special educators' day-to-day work? Why should special educators be involved in advocacy activities? Answers to these questions form the basis for this introductory module on understanding advocacy.

As a result of working through activities in this module, participants will:

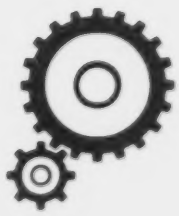
- Understand advocacy—what it is, its relationship to special education practice, and why it's important for special educators and others to be actively involved in advocacy activities.
- Develop an appreciation for the current political climate at the federal level.
- Identify various myths about advocacy.

Background Information

Today, children and youth with disabilities are guaranteed the right to a free and appropriate education in the least restrictive environment. But this was not always the case. Many of us can remember back to the days prior to 1975, before President Ford signed into effect Public Law 94-142, when children were excluded or relegated to rooms the size of closets located next to boiler rooms or in basements.

Thanks to advocates working on behalf of children, their teachers, and their families, our ability to serve the educational needs of children with disabilities has come a long way in the last few decades. Our profession has seen incredible successes—children on whom society had once given up all hope, are living and learning alongside their able bodied peers. Given the educational opportunities afforded them through legislation and policy, many children with disabilities have grown and developed into productive, contributing members of society. The field of special education has much to be proud of—special educators can take much pride in what they have accomplished.

However, while it might be tempting to sit back and rest on our laurels, we must be diligent in advocating for the continued guarantee of fundamental educational rights to children with disabilities, or risk the erosion of those rights. For many reasons, society and its elected officials continue to question the viability of educational rights for our children. Some have even attacked our work in an attempt to expedite their own exclusive agenda. If we are to maintain fundamental educational rights for children with disabilities, and ensure that educators and families have access to the latest and most effective research, technology, and resources available, then action is needed. Advocacy is one of the most powerful ways we



can assure that the educational rights of children with disabilities are supported and strengthened.

Defining Advocacy

According to ***Webster's II Dictionary***, to advocate means to recommend. An advocate is: 1) one who supports or defends a cause; 2) one who pleads on behalf of another.

Part of the difficulty in understanding advocacy concerns the misconceptions that accompany it. Over the years, a number of myths have attached themselves to society's perception of advocacy. Following are the most common.

Myth: Advocacy denotes a "dirty" business. ***Fact:*** Advocating social policies—working to correct what is wrong—is everyone's right and everyone's obligation. Public policy is made by citizens and thus, advocacy is critical to a democratic society's existence. Only those individuals who do not understand how public policy is made could believe that citizens should not engage in advocacy. Moreover, wanting to improve society for the benefit of all its citizens is not only admirable but essential. Advocacy of worthy causes is the highest form of participation in an open society.

Myth: Advocacy in federal and state government is only for professional lobbyists. ***Fact:*** Citizen advocates are inherently credible in a way that professional advocates cannot be. When you advocate social reforms it is because you believe they are right, not because someone is paying you to do so.

The best advocates are those individuals who have direct experience with and a personal perspective of what they are advocating for. In other words, individuals who are directly concerned with improving education for children with disabilities are the best advocates for these children. Advocates who are well-connected and who know their subject matter well can be very valuable to legislators. Legislators tend to be pressed for time, have small or no staffs and few other resources, have many demands on them, and often need to get good information they can trust very quickly. This is particularly true at the state level. Who is better equipped to provide solid and trustworthy information than someone connected to the field—someone like yourself? As an educator, part of your everyday duties include influencing the thoughts, knowledge, and opinions of those you come into contact with. You are already adept at formulating, planning, and presenting information—skills that are important to the advocacy process.

Finally, because you are a voting constituent, and you represent an organization composed of other voting constituents, you will be in a much better position to influence your politicians. Don't forget that your elected representatives hold office to serve **you** and your fellow constituents. They know that if they perform well, voters will keep them in their jobs.

Myth: To be successful in advocacy, you have to "know someone."
Fact: The more you know about someone, the easier it is to persuade him or her. Fortunately, politicians lead very public lives, and it is easy to learn a great deal about them. If members of your CEC federation or division already have personal contacts with officeholders, use them. There is nothing wrong with this approach; in fact, it is recommended. But if you do not already have personal relationships with the officials who will be important in achieving your goals, form them.

Getting to Know Your Elected Officials

Politicians have some common characteristics that make the outcome of advocacy efforts more predictable. Knowing these characteristics, and knowing how to take advantage of them, can improve your chances for success. And vice versa!

- ***Politicians hold public office to help others.*** Most people run for public office so that they can help others. Remember this when you approach your policy makers

because you need the help that they can give.

- ***Politicians like to be asked for help.*** Few politicians come to public office with a pre-formed, personal agenda. Their platforms are usually composed of issues they think are important to their constituents. Consequently, few politicians will reach out to correct a social wrong simply because it is there. Rather, they have to be made aware of the problem, be given background information about the problem, be provided with suggestions to solve the problem, and asked for their help in solving it. Get used to the idea that asking for help is a sign of strength, not weakness.
- ***Politicians are good learners.*** Most politicians are intelligent. Almost by definition, they have good people skills, "street smarts," and political acumen. In addition, as they serve in public office over time, they learn a great deal. Some of them become experts in particular fields. As you formulate your plans for influencing a politician, always begin with educating him or her about the issue.
- ***Politicians do not know everything.*** Even the most astute and hardworking politicians have to deal every day with issues about which they know little or nothing. Consider that at the federal level, during an average session (e.g., one year of a two-year Congress), members are asked to cast between 500 and 600 votes. Obviously there is insufficient time to become an expert in all, or even in most, of the areas these votes will cover. Therefore, good politicians are always open to good information. Once they find a reliable source for good information, they most likely will cultivate the source.
- ***Politicians have many demands on their time.*** Politicians always have more to do than they can get done. This fact offers several important clues for your approach to them. First, never waste a politician's time. Second, do not overload your elected representative with demands, but work to make his or her job easier. In other words, don't expect to sit back and let the politician work for you—you must contribute as well. Third, since politicians must prioritize the issues they handle and will inevitably ignore those that fall to the bottom of the list, you must work to frame your issue as important and achievable.
- ***Politicians do not have sufficient resources to meet the demands made on them.*** At the federal level, members of the House and Senate have large staffs and large budgets, but they also have large constituencies to serve. In many states, elected representatives are expected to cover the same broad issues with no staff at all. This is why at the state level, good information, trusted informants, and other outside resources are even more precious. The more you can do to assist those individuals whom you have asked to represent your issue, the better. If a lasting relationship grows out of your work on special education issues, so much the better.
- ***Politicians are always running for office.*** Elected politicians have two very different jobs: running for office, and making policy while in office. Only one of these is indispensable. The fact that they serve at the will of the people makes politicians very responsive to their constituents. Therefore, try to visit a politician in the company of at least one voting constituent (e.g., a person from his or her home district). And, remember that few politicians turn down access to large audiences of voting constituents.
- ***Politicians respond to crises.*** Because of large demands and small resources, politicians seldom have the luxury of long-range planning. Rather, they respond to emergencies, disasters, and whatever is hot in the news. This phenomenon is sometimes called the "60 Minutes Bill." That is, on Monday mornings, politicians in state legislatures all over the country introduce bills to correct whatever crisis was featured most prominently on the Sunday evening news. Your job is to portray the situation facing students with exceptionalities and their teachers as a crisis, but one that can be remedied.

- ***Politicians behave differently when they know they're being watched.*** This fact does not make politicians any different from the rest of us. It is included here to remind you of the importance of constant monitoring. This may be accomplished through tracking the voting record and referring to their records in all correspondence to them.
- ***Politicians like to be thanked.*** Everyone likes to be thanked for a job well-done. You should always express your gratitude when an official has helped you, even if he or she was unable to achieve the desired result. Thank you's are long remembered.
- ***Politicians love good press!*** They love it when you can make them look good in the public eye, especially when it's done with little or no effort on their part. Bring your camera and take pictures, then send them to the local press.
- ***Politicians like getting to know new people.*** If you can, arrange a "reception" or a legislative breakfast so your whole organization can meet and get to know your elected officials. Or, invite them to CEC-sponsored events or school-based activities involving students with exceptionalities. Politicians seldom turn down invitations that give them access to large audiences. Or, simply "drop in" the politician's office for an impromptu visit—often a good way to get acquainted!

Get to know your elected officials. At the very least, keep track of how they voted on important issues. One way to keep tabs on how members of Congress voted is to consult the web site at:

http://www.timeinc.com/cgi-bin/congress-votes

Advocacy in Special Education

Advocacy has always played an important role in special education. *Figure 1* shows a timeline of recent significant legislation affecting children and youth with disabilities.

According to 1995 testimony presented by **Fred Weintraub** of the Council for Exceptional Children during the Senate hearings on reauthorization of the **Individuals with Disabilities Act** (IDEA), among the factors that led to IDEA and the original law (P.L. 94-142) were:

- The education community, other professionals, parents, state and local governments, and civil rights interests all had a stake in its passage.
- While motives differed, a broad coalition of individuals with similar interests supported and worked for the bill's passage.
- Bipartisan support for disability issues was maintained throughout the legislative process.

In other words, advocacy was the process by which individuals were able to support and defend fundamental rights for children with disabilities. Through advocacy efforts, individuals were able to come together to enact legislation.

Special Educators Are Excellent Advocates

The Council for Exceptional Children (CEC) is the largest professional organization representing those individuals dedicated to improving the educational outcomes for children and youth with disabilities and those who are gifted. CEC has a proud history as a force in the federal arena. Through the Children and Youth Action Network (CAN), CEC members represent a force for meeting the policy challenges in the communities in which they live and work.

Social reform can be an arduous process. To succeed, a reformer must be strong, dedicated, persistent, and willing to work hard. But if you are willing to make the investment required, you can make a difference. This is the key to successful advocacy.

Most special educators, as well as those individuals committed to improving education for children with disabilities, are already accomplished advocates—both at home or in the classroom. Educators are experts at presenting information in ways that result in

Figure 1: Recent Legislation Affecting the Education of Children and Youth with Exceptionalities

Free and Appropriate Education

- 1994 — P.L. 103-382, IDEA Amendments through the Improving America's Schools Act
- 1992 — P.L. 102-421, IDEA Amendments
- 1991 — P.L. 102-119, Early Childhood Amendments to IDEA
- 1990 — P.L. 101-476, Individuals with Disabilities Education Act (IDEA)
- 1986 — P.L. 99-457, Early Childhood Amendments
- 1983 — P.L. 98-199, Education of the Handicapped Amendments
- 1975 — P.L. 94-142, The Education for All Handicapped Children Act
- 1970 — P.L. 91-230, Introduction of the Education for All Handicapped Children Act.

Vocational Education

- 1990 — P.L. 101-392, Carl Perkins Vocational & Applied Technology Education Act Amendments
- 1984 — P.L. 98-524, Carl Perkins Vocational Education Act
- 1968 — P.L. 90-576, Vocational Education Amendments

Related Laws

- 1992 — P.L. 102-569, Rehabilitation Act Amendments
- 1992 — P.L. 102-421, Education of the Deaf Act Amendments
- 1990 — P.L. 101-336, Americans with Disabilities Act
- 1988 — P.L. 100-407, Technology-Related Assistance for IDEA
- 1986 — P.L. 99-371, Education of the Deaf Act
- 1986 — P.L 99-372, Handicapped Children's Protection Act
- 1978 — P.L. 95-602, Rehabilitation, Comprehensive Services, and Developmental Disabilities Amendments
- 1973 — P.L. 93-112, Rehabilitation Act
- 1969 — P.L. 91-230, Extension of Programs of Assistance for Elementary and Secondary Education (Education of the Handicapped Act)
- 1968 — P.L. 90-538, Handicapped Children's Early Education Assistance Act
- 1965 — P.L. 89--313, Federal Assistance to State-Operated and Supported Schools for the Handicapped
- 1963 — P.L. 88-164, Mental Retardation Facilities and Community Mental Health Centers Construction Act of 1963

Gifted and Talented Education

- 1988 — P.L. 100-297, Hawkins/Stafford School Improvement Act (Jacob K. Javits Gifted and Talented Students Act)
- 1978 — P.L. 95-561, Education Amendments, Gifted and Talented Children's Education Act

agreement. The individual who has accurate, useful, well-packaged, meaningful, and hard-hitting information can exercise great power in the policy-making arena. Educators already possess much of the information that is needed for advocacy work—***because the best information comes from personal experience.*** Educators who are willing to share this very personal information with policy makers can make significant strides in helping lawmakers understand the realities of the field.

Every policy-making body, from legislatures composed of elected officials, to regulatory agencies run by administrators, to large companies managed by boards of directors, to local school boards, has its own process for decision-making and policy implementation. As you learn about the process and the

people who control the systems you are trying to influence, you will discover what makes advocacy work, where the intervention points are, who controls access and outcome, what and who determines the timing. You must delve into the system, form personal relationships, and become a part of the process to produce change from within.

Understanding the process, developing good contacts, having good information, and knowing how to put your information and contacts to use is what advocacy is all about. This is why the experience you gain and the skills you develop in advocating for social reform can be transferred to other activities at other levels. Once you realize that the system is open and accessible, you will appreciate how much power you have as a citizen advocate. If you are willing to work hard and use that power, you can make a big difference.

Further Reading

If you are interested in learning more about advocacy in special education, consider the following sources.

Barringer, Mary-Dean (1992). Voices and visions: Reflecting on education reform and children with disabilities. ***Teaching Exceptional Children,*** 25(1), 59-60.

Dinsmore, Alan M. (1982). You can stop the cuts: Practical lessons on becoming a politician. ***Journal of Visual Impairment and Blindness, 76***(5), 161-165.

Hunter, Richard W. (1994). ***Parents as policy-makers: A handbook for effective participation***. Portland, OR: Portland State University, Research and Training Center on Family Support and Children's Mental Health.

Powers, David A., and Anderson, Patricia J. (1991). Advocacy for latchkey children: A new challenge for special educators. ***Teaching Exceptional Children***, 23(5), 49-51.

Ramos, Kari (1994). Advocacy: Friend or foe? ***Preventing School Failure, 39*** (1), 37-40.

Zirpoli, Thomas J. (1994). Partners in policymaking: The first five years. ***Mental Retardation, 32*** (6), 422-25.

In addition, you can contact the Department of Public Policy at the Council for Exceptional Children by calling (703) 264-9498 or writing at 1920 Association Drive, Reston, VA 20191. Or, log onto the CEC World Wide Web site at:

http://www.cec.sped.org

Ask for the name of the Children and Youth Action Network coordinator in your state or province for even more information.

Advocacy Training Workshop

This section provides you with ideas for introducing the concept of advocacy to a group of special educators. Specifically, the objectives of the session or workshop are:

- To assist participants in understanding advocacy.
- To encourage participants to think about how they might take on an advocacy role.

The session is organized as an one-hour presentation, which can be expanded if time permits. *Figure 2* presents a sample agenda.

Warm-Up Activity

The purpose of the warm-up activity is to find out participants' prior knowledge of and experience with advocacy. In addition to setting the agenda for the session, the following activities are offered as examples of opportunities you might use to help participants become actively engaged in activating and sharing their prior knowledge.

Who Am I?

This activity focuses on dispelling attitudes and myths about advocacy and uses information from the "What Makes Politicians Tick?" section of this module. Participants are given 10 clues (each clue is referenced to a fact about politicians). After each clue is presented, their task is to identify "who" the clue describes. For example, if the first clue was, "I like to be asked for help," participants would be encouraged to generate a list of possible professions (e.g., nurse, teacher). The activity ends when they guess "politician."

Materials: Provide an overhead for each clue, with spaces to fill in the participants' responses. The blackline master in *Appendix 1A* can be used as a guide. You will also need an overhead projector.

Figure 2: Agenda

Time	Activity	Purpose	Process
5 minutes	Welcome & Introductions	Set positive tone; Clarify Expectation	Facilitator welcomes participants; introduces self; provides overall goal of the session.
15 minutes	Participant Introductions and Warm-Up Activity	Set positive and interactive tone; activate prior knowledge.	Participants introduce themselves and participate in warm-up; facilitator orients group to content to be presented.
20 minutes	Content Presentation with questions and answers	To transfer knowledge to participants; provide participants with opportunity to ask questions.	Facilitator shares information, either in mini-lecture or informal presentation.
15 minutes	Application Activity	To assist participants in applying their knowledge; encourage participants to want to do more with their knowledge.	Participate in activity and/or discussion about next steps.
5 minutes	Closure	"Wrap-up" session & provide opportunity for feedback.	Facilitator thanks participants; encourages feedback; gets a sense of those participants who want to participate further.

Procedures: Tell the participants that you have a game. Their goal is to identify the profession you are thinking of based on clues you will give them. Present the first clue and ask, "Who Am I?" Record the top answer (or top three answers). Show them the next clue and repeat the process. Each time, ask why they chose their answers. The game ends when they identify the profession as politician.

Sometimes, participants will be "wise" to your trick and pick politician early on in the game. A variation is to have the participants review **all** of the clues before deciding. Record their guesses for each clue, then put the participants into teams to decide the answer. Let the teams "debate" the right answer before revealing the "right" answer.

During debriefing, ask participants if they were surprised that the clues described a politician. Were there any clues in particular that seemed inappropriately attributed to a politician? Discuss how people have been led to believe that being a politician is a dirty profession—politicians are people to be feared and avoided. Encourage participants to identify other clues that might be used to describe a politician. Ask if participants know any politicians personally—if yes, what traits would they attribute to these individuals?

End the activity by summarizing the facts about politicians. Move into the presentation on advocacy.

Agree or Disagree?

This activity focuses on dispelling attitudes and myths about advocacy and uses information contained in this module. Participants will vote on each "Myths about Advocacy."

Materials: Provide an overhead for each myth, with spaces to fill in the participants' votes. Participants will be allowed to vote: Strongly agree, agree, disagree, and strongly disagree. The blackline master in *Appendix 1B* can be used as a guide. You will also need an overhead projector.

Procedures: Tell the participants that you will show them several statements about advocacy. Their challenge is to determine if the statement is true or false. Explain that you will show them the statement, give them 5 seconds to consider their answer (strongly agree, agree, disagree, strongly disagree), then collect their votes.

Show the participants the first myth and complete the process. Debrief with the group. Ask participants to share their reasoning. From this point, you can make a natural transition into your presentation on advocacy.

The Web

This activity can be done individually or in a large group. The purpose of this activity is to portray participants' prior knowledge and experience with advocacy in a visual representation. *Figure 3* presents a sample of a completed web.

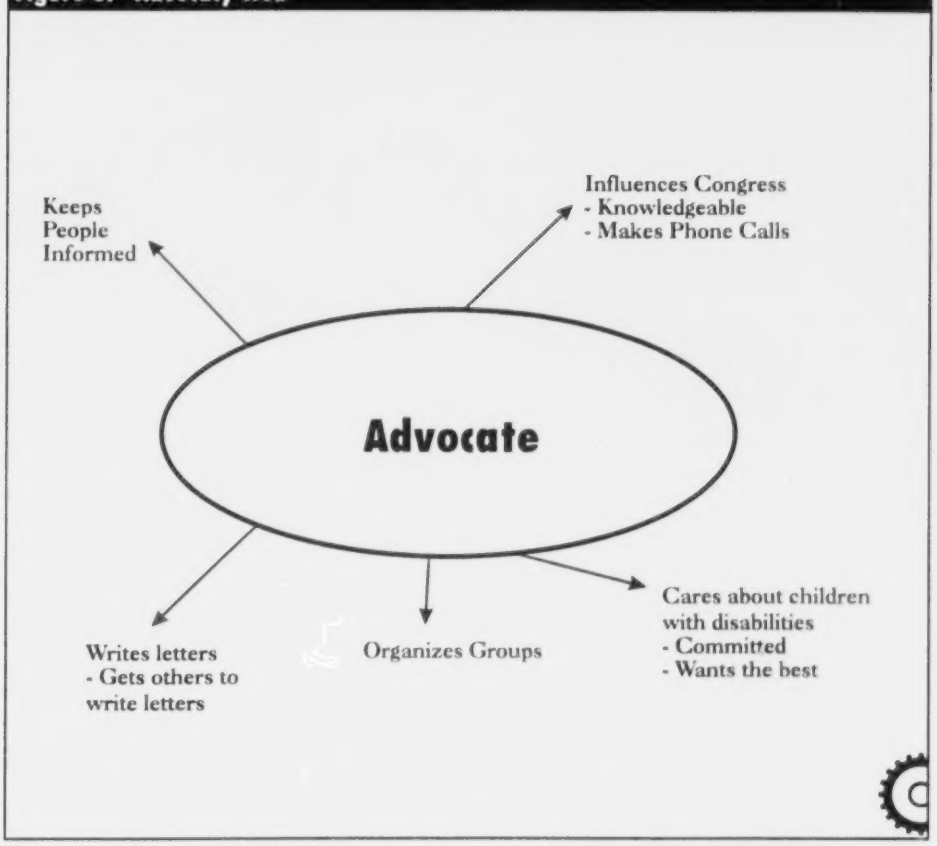
Materials: You will need an overhead or large piece of chart paper. The blackline master in *Appendix 1C* can be used either for preparing an overhead or participant handout. An overhead projector will be needed.

Procedures: Tell participants that they will be creating a web of their knowledge about advocacy. Take three minutes and have them reflect on "everything" they know about advocacy. Ask them "What's the first thing that comes to your mind when you think of the word?"

Begin by showing a large oval, with the word "Advocate" in the center. Ask the participants to contribute ideas describing this word. As each participant contributes a word or phrase, write it on the web. If possible, try and organize ideas according to "themes" and associate certain words with these themes.

Debrief the activity. Ask them to focus on certain skills or attributes that might have been generated in the web—ask participants to identify those skills or attributes in themselves. This last step can be used to

Figure 3: Advocacy Web



move the discussion to a consideration of how they are already advocates in varying ways. Use the overhead in *Appendix 1D* to discuss.

Hi! I'm an Advocate!

Designed as an ice-breaker, this activity serves two purposes: to allow for introductions and to orient participants' thinking to the topic at hand. As the activity is facilitator-directed, it should be done at the beginning of the workshop session. As participants introduce themselves, they include a brief statement of how they've served as an advocate sometime in their lives.

Materials: Use the blackline master in *Appendix 1E* to create an overhead. You will also need an overhead projector.

Procedures: Put the definition of advocacy up on the overhead. Ask participants to introduce themselves as they normally would do (e.g., name, position, where from), but to also share a personal experience with advocacy. Make sure that you review the definition with the group, and to point out that there is a range of behaviors that result in advocacy. For example, if participants can't think of an example, ask them, "Did you ever try to persuade someone to see your side of things?" "Have you ever given someone further information so that they might understand an issue to a greater extent (e.g., testimony, letters)?"

As a variation, record words or phrases (i.e., verbs such as caring, sharing information, persuading), that demonstrate that everyone has what it takes to be an advocate.

If you are working with a small, manageable group, conduct the activity with the entire group. If working with a large group, you might consider conducting this activity by having participants pair up and share their experiences with each other first, introduce

each other and share what they've learned.

This activity makes a nice segue into a discussion of what advocacy is and how we all can be advocates at some level.

Content Presentation

There are several topics that should be covered during this portion of the agenda:

- Definition of advocacy (see *Appendix 1E* for overhead). Depending on your choice of warm-up activity, *Appendices 1D* and *1F* also make good references for this discussion.
- Milestones in special education legislation (see *Appendix 1G* for overhead).
- Description of the current political climate in Washington. Answer the question, "Why now?" for participants.
- What action is needed—What participants can do (see *Appendix 1H* for a quote to orient thinking).

Depending on your group, select all or some of these topics. You might want to add additional topics. In any case, it is important that participants leave this part of the agenda with a clear understanding of what advocacy is and how advocacy work relates to them.

Next Steps: Application Activities

In this final part of the agenda, you will need to wrap-up and give the participants a strategy for using the information that you just covered. At the very least, you will need to thank participants for their time, leave them with a way to contact you for further information (see *Appendix 1I* for cover sheet), and to provide them with a tangible way to get involved in advocacy work now (e.g., get involved with the CEC Children and Youth Action Network, attend additional training events). You should also distribute CEC membership information and forms (see *Appendix 1J*).

Following are several sample activities that might also be used to encourage participants to apply the information.

Yes, But...

The purpose of this activity is to help participants articulate their practical concerns with becoming an advocate. Participants are invited to make statements that represent their resistance.

Materials: Overhead (see *Appendix 1K* for blackline master) and overhead projector.

Procedures: Tell participants that you would like them to consider the roadblocks that prevent them from becoming better advocates. You want them to complete the sentence: Yes, I want to be a better advocate, but... A variation of this is to have participants actually state a positive belief about advocacy (e.g., Yes, I believe that advocates are essential to ensuring educational rights for children with exceptionalities), followed by their reluctance to get involved (but, I don't know how to get involved).

Have participants fill in the sentence for as many concerns as they have. You can either have people work independently and then share, or to have the entire group share at once. If you select this latter alternative, then it is helpful to use a "whip" technique. Start with an individual. Ask for the other group members to raise their hands if they agree. Move to the next person and so on until the group has run out of concerns.

Usually, if participants believe that they are advocates, their concerns will center on issues such as how to become involved, how to find out more information, and how to find time to pursue this interest. This is your opportunity to invite participants to further their involvement with CEC and additional workshop sessions that you might offer.

Discussion

Finish the session with a question and answer period. To encourage application, ask questions such as:

- What advocacy work have you been involved in?
- Do you know anyone who is involved in advocacy work?

• What types of issues require advocacy?

Wrap-up the discussion by asking participants to generate their own questions.

Local Speaker

A personal account of advocacy presented by a local speaker can go a long way in demonstrating the importance of such work. Bring in someone from the area to speak about advocacy. Help them to structure their presentation by suggesting that they organize their testimonial into a mini case study outlining their advocacy efforts. Encourage them to give examples of who was involved in the advocacy efforts. During discussion after the presentation, draw attention to any similarities the speaker has with the participants.

Extensions

If you have additional time and/or if you are planning on meeting with this group again, consider including the participants in a more involved application activity. The following activities are offered as examples.

Do You Know Who?

In this activity, participants review their knowledge of their elected federal and state legislators. Through the activity, participants find out where their legislators stand on special education related issues.

Materials: Make copies of the blackline master in *Appendix IL* for participants. Information includes the following for each state and federal official:

- Name, address, phone number, and position
- Party affiliation
- Tenure
- Stance on key special education issues
- Next re-election date
- Endorsements

Procedures: Ask participants to fill out as much of the form as they can before leaving. Make sure that the entire group lists all of the officials. In the group, identify the key special education issues. Make a list of the issues and ask the group to vote on the priorities (or have them arrive at a consensus on the major ones).

Direct participants to collect information about their officials. They can do the following:

- Read the newspapers.
- Call the legislator's office and ask.
- Read the U.S. Congress Handbook (available at the library).
- Call the Department of Public Policy at CEC and request a list of the Congressional committees and subcommittees that affect special education.
- Look in the "Blue Pages" of your local phone book, under "State Government," for the phone number of Government Information Assistance.

Set a time frame for when the group will return with their information. If you have a large group, divide it into smaller groups and assign a particular official to each group. When the group reconvenes, pool information.

When the group returns, you might consider having them design an individualized education plan for each public official.

Issues

The purpose of this activity is to identify possible issues that might require advocacy work.

Ask the group to generate a list of issues that need to be considered either at the local, state, or federal level. Discuss whether any of the issues mentioned are part of the current political dialogue. For example, have they been considered in the state legislature or by the local school board? Assign working teams to each issue. Have them

identify the issue and decide who on the team will pursue finding out the particular official's stand on the issue. Also, ask them to determine the different ways that they might present such an issue to the public official (e.g., through a letter, giving public comment, etc.).

Reconvene the group at an agreed upon later time to pool information. At that time, depending on the interest, you might move participants into learning specific strategies for communicating their concerns to their officials. This makes an excellent transition to the information contained in the modules that follow.

Who Am I?

- I help others.
- I like to be asked for help.
- I am a good learner.
- I do not know everything!
- I have many demands on my time.
- I do not have sufficient resources to meet demands made on me.
- Somebody is always trying to take my job away from me.
- I respond to crises.
- I behave differently when I know I'm being watched.
- I like to be thanked.
- I love good press!
- I like getting to know new people.

Myths about Advocacy

- Advocacy denotes a "dirty" business.
- Advocacy is only for professional lobbyists.
- To be successful in advocacy, you have to know someone.

Advocate

You are already an accomplished advocate!

To advocate means to recommend. An advocate is:

- Someone who supports or defends a cause.
- Someone who pleads on behalf of another.

What Makes Politicians Tick

- Politicians hold public office to help others.
- Politicians like to be asked for help.
- Politicians are good learners.
- Politicians do not know everything!
- Politicians have many demands on their time.
- Politicians do not have sufficient resources to meet demands made on them.
- Politicians are always running for office.
- Politicians respond to crises.
- Politicians behave differently when they know they're being watched.

- Politicians like to be thanked.
- Politicians love good press!
- Politicians like getting to know new people.

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- 1978 — P.L. 95-561, Education Amendments, Gifted and Talented Children's Education Act

Politics are too serious a matter to be left to the politicians.

- Charles De Gaulle, 1962

Introduction to Advocacy

Presented by:

CEC Membership Form

(Following Page)

The Council for Exceptional Children

1920 Association Drive
Reston, Virginia 20191-1589
VOICE 1-800-845-6232
TTY 703/264-9446
FAX 703/264-9494

Membership Application

If chapter number is not known, please leave blank. CEC will inform you of your local chapter number. If Student CEC chapter number is not known, please list the full name of your college or university.

1. Address Information

PLEASE PRINT • Use a dark #2 pencil or black ink (ball point or marker)

Chapter #:

FIRST NAME | MIDDLE INITIAL | LAST NAME

☐ HOME ☐ WORK ADDRESS

STREET NUMBER AND NAME OR P.O. BOX AND NUMBER

CITY | STATE OR PROVINCE | U.S. ZIP + 4 / POSTAL CODE

AREA CODE | WORK PHONE | AREA CODE | HOME PHONE | AREA CODE | FAX NUMBER

E-MAIL ADDRESS

CEC may make available, at an appropriate charge, the full or partial list of its members to certain carefully selected companies or organizations serving the fields of general and special education. If you do not want your name included, please check this box. ☐

2. Yes! I Accept

Please check your combined CEC International and State/Province Dues.

MAILING ADDRESS
U.S. States

	Regular	Student*
GA, ME, TX	$75.00 ☐	$33.00 ☐
FL	$75.50 ☐	$32.50 ☐
DE, KS, NV, VT	$76.00 ☐	$32.50 ☐
CT	$76.00 ☐	$33.00 ☐
AZ, MT, NC, PA, RI, UT, WA	$77.00 ☐	$32.50 ☐
MD	$77.00 ☐	$33.00 ☐
CO, IL, NE, OH, OR, SC, VA, WI, WY	$79.00 ☐	$32.50 ☐
AK, NY	$80.00 ☐	$32.50 ☐
CA	$82.00 ☐	$33.00 ☐
MI, MN	$82.00 ☐	$32.50 ☐
Other States and Provinces	$74.00 ☐	$32.50 ☐

*Student Discount Requirements. To be eligible for student membership, your advisor must complete the following:

I certify that the above named person is a full-time college or university student or a part-time student not engaged in full-time employment as a certified professional in the education profession.

Advisor's Signature _____

University/College _____

Expected Graduation Date _____

Special Paraprofessional, Parent, Retired, and Joint Memberships: Call CEC 1-800-845-6232 for dues information.

3. CEC Gives You More!

Please Check All Divisions You Wish To Join.

Divisions		Regular	Student*
Division for Physical and Health Disabilities•DPHD	A	$12.00 ☐	$ 6.00 ☐
Council of Administrators of Special Education•CASE	B	40.00 ☐	20.00 ☐
Council for Children with Behavioral Disorders•CCBD	C	22.00 ☐	12.00 ☐
Division on Mental Retardation & Developmental Disabilities•MRDD	D	15.00 ☐	6.00 ☐
Division for Children's Communication Development•DCCD	E	15.00 ☐	7.50 ☐
Division for Learning Disabilities•DLD	F	20.00 ☐	13.00 ☐
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Division of International Special Education & Services•DISES	R	15.00 ☐	7.50 ☐

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BEST COPY AVAILABLE

Yes, I want to be a better advocate	But...

Official Scorecard

Official's Name			
Office (U.S. Senator, U.S. Rep, etc.)			
Party Affiliation			
Tenure			
Stance on Special Education Issues			
Next Re-Election Date			
Endorsement			
Notes			

4c

Module TWO

Understanding the Governmental Process

How does a bill become a law? What is the budgeting process? Why is the regulatory stage sometimes a target for advocacy efforts? A good starting place in fine-tuning your advocacy skills is understanding how local, state, and federal governments work. An understanding of how these different governmental processes operate will assist you in choosing the right entry point at which to influence the system.

As a result of working through activities in this module, participants will:

- Understand the federal legislative process. Specific attention will be given to how a bill becomes a law, the budgeting process, and the purpose of the regulatory process.
- Review their own state legislative processes.
- Explore how such knowledge can be used to enhance strategies for advocacy work.

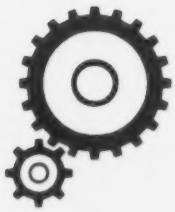
Information in this module will be referred to in Module 3 as part of the discussion on lobbying skills.

Background Information

Advocacy does not happen in a vacuum. Nor do advocacy efforts always affect the same governmental process. In order to develop a meaningful advocacy plan, you must learn the rules by which the different governmental processes operate.

At the federal level, there are two senators from each state and they serve six-year terms. One-third of them are elected every two years and senators from the same state are not elected in the same year. The federal census determines each state's portion of 435 representative seats, and state legislatures determine congressional district boundaries for each representative, who serves a two-year term. A Congress begins on January 3rd of odd-numbered years. It lasts two years and is divided by year into a first and second session. Elections to Senate and House seats are held in November of even-numbered years.

Each state legislature will have its own particular rules, staffing system, committee structure, and calendar. But they all have a lot in common with each other and with the United States Congress. What follows is an outline of the federal system for your background information. To learn the particulars in your own state, contact your CEC federation Children and Youth Action Network (CAN) Coordinator. If you are not sure who your state or province CAN Coordinator is, contact CEC's Department of Public Policy at (703) 264-9498.



How A Federal Bill Becomes A Law

A member of either chamber (the U.S. House of Representatives or the U.S. Senate) can introduce a bill. Bills are rarely introduced unless they have the backing of a constituent group. Thus, it is no surprise that legislators, in an attempt to keep constituents happy, introduce many more bills each session than ever become law.

Figure 4 gives a graphic representation of how legislation passes through Congress. Note where citizen influence might be exerted.

All laws originate with someone's "good" idea. The first step in transforming an idea into a bill begins with its translation into technical language by a legislative drafter. Once drafted, the bill then begins moving through the appropriate channels. In the House, the first step in this process is referred to as "dropping it into the hopper" (literally, the name of the box into which bills are dropped).

The bill is assigned a number, prefixed with "H.R." in the House and "S." in the Senate. When it is printed, it will also carry the names of the original sponsors, although additional members may sign on as sponsors at any time.

The bill is then referred to the appropriate committee(s). This referral is technically considered the "first reading." It is in the committee structure that the substance of the bill comes under closest scrutiny and where the large majority of bills die. If a bill's chances for passage are considered good, typically, the next step involves requesting comment by interested government agencies. The committee chairman can also assign the bill to a subcommittee or ask that the full committee consider it.

Sometimes hearings—either open to the public, closed, or both—are held on the bill. After the hearing, a vote is usually taken. At that time, the subcommittee can sit on the bill (take no action) or refer it back to the full committee with recommendations for action and for any amendments—a process which is called "ordering a bill reported." The full committee can then "mark up" or make amendments and vote on the measure. Or the committee can "kill" the bill through inaction. If the committee reports the bill back to the full House or Senate, the bill will then be put on a calendar for further consideration.

The bill is now ready for debate. In the House, the Rules Committee controls the flow of legislation by issuing rules for floor debate. There are technical ways to end-run the Rules Committee, but the Committee exercises considerable power. The Rules Committee will decide whether amendments will be entertained (debate under an "open rule") or not ("closed rule"). The length for debate in the House varies, but is always limited. Debate in the Senate is usually unlimited, although a filibuster can be halted by a three-fifths majority vote on "cloture."

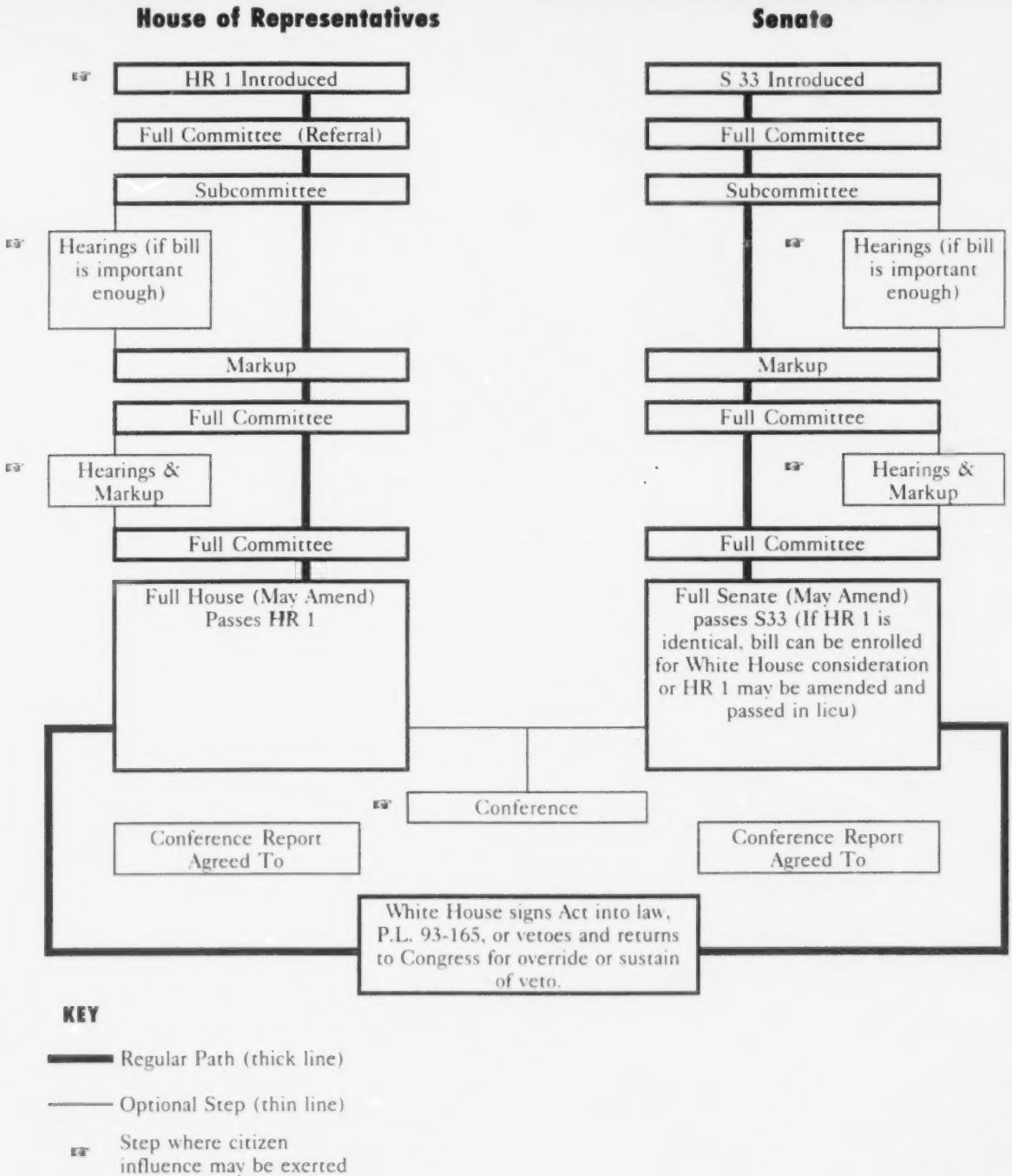
A bill can be voted on many times, not just in subcommittee and full committee, but often on the rule for it and usually on any amendments considered on the floor of the full chamber. Amendments can even be amended.

After amendments have been voted on, a motion can be made to recommit the bill to committee (this does not happen very often). If a bill survives this motion, it is "read for the third time," and a vote is taken on final passage.

In the full Senate, a vote can be by voice (uncounted), by standing (counted but not recorded), or by recorded roll call. In the House, recorded votes are done electronically. If passed in one chamber, the bill is sent to the other. There it can be passed as is, sent to committee, rejected, ignored, or passed with substitute language. If the opposite chamber alters the bill submitted to it, the differing versions from each house are "sent to conference."

When a bill is sent to conference, conferees from both chambers try to work out the differences between them through compro-

Figure 4. A Typical Journey for Legislation in Congress


House of Representatives
Senate
HR 1 Introduced
Full Committee (Referral)
Subcommittee
Hearings (if bill is important enough)
Markup
Full Committee
Hearings & Markup
Full Committee
Full House (May Amend) Passes HR 1
S 33 Introduced
Full Committee
Subcommittee
Hearings (if bill is important enough)
Markup
Full Committee
Hearings & Markup
Full Committee
Full Senate (May Amend) passes S33 (If HR 1 is identical, bill can be enrolled for White House consideration or HR 1 may be amended and passed in lieu)
Conference
Conference Report Agreed To
Conference Report Agreed To
White House signs Act into law, P.L. 93-165, or vetoes and returns to Congress for override or sustain of veto.
KEY
Regular Path (thick line)
Optional Step (thin line)
Step where citizen influence may be exerted

mise. Usually, this is a long, drawn-out process, and sometimes bills die in conference. However, when agreement is reached, a conference report is prepared that embodies the compromises, and the conference report is voted on by each body.

Approval of the conference report constitutes approval of what is now referred to as the "compromise bill." A bill may also move concurrently through the House and Senate. After the same bill has been passed by both chambers, it is sent to the President. The President can sign it, thereby enacting it into law immediately. If the bill is not signed and Congress is in session, it becomes law automatically after ten days. If the bill is not signed and Congress is not in session, it dies after ten days (this is known as a "pocket veto").

The President can also veto the bill by returning it to Congress within ten days along with a list of reasons for the veto. A recorded two-thirds vote of all present (and they must equal at least a quorum) in both houses is required to override a veto. Otherwise the measure is killed.

If a bill is not acted upon before a Congressional session terminates, then it must be reintroduced in one of the houses when the new session begins. This tactic is sometimes used to stall a bill.

It is obvious why it is so much easier to kill a bill than to pass one. The rules that govern Congress can be changed, but most of the time they operate to keep the pace of legislation slow and deliberative.

Authorizing Legislation and Appropriating Funds

In the Congress of the United States, it is most important to be aware of the two quite distinct legislative processes, appropriations and authorizations. These processes involve separate committees as well as separate legislative bills. Authorizing committees create programs, set general directions, and alter existing federal programs. In fact, they do everything but provide the actual dollars.

There are numerous authorizing committees in both houses of the Congress. The primary one in the Senate concerned with programs for children with exceptionalities is the Labor and Human Resources Committee. The primary one in the House concerned with programs for children with exceptionalities is the Economic and Educational Opportunities Committee.

It is the function of the Senate and House Appropriations Committees to determine how many dollars shall be allocated. There is only one Appropriations Committee in each of the houses. All appropriations bills must initiate in the House.

Budget Committees exist in both houses with a charge to set overall budget priorities for each fiscal year, which begins on October 1. *Figure 5* shows the budget resolution process.

Understanding terminology about the budget process is critical, as misuse of terms might result in the legislator getting the wrong message. For example, the following terms can mean different things to different people, depending on their point of view:

- ***Level funding.*** Same funding level as the last fiscal year (FY). There may or may not be a cost of living increase attached.
- ***Freeze.*** The previous FY level of funding with no cost of living increase included.
- ***Cut.*** A figure lower than the previous FY budget, which results in lower spending.

It is vital that the dual nature of the U.S. Congress be kept in mind when considering your advocacy strategy. A battle may be won with the authorizing committees by creating or changing a program, but if that program is to have meaningful financial support, energies must then be shifted to the appropriations committees. When a fiscal year begins and Congress has not yet enacted all the regular appropriations bills for that year, Congress passes a joint resolution, "continuing appropriations" for government agencies at rates generally based on their previous year's appropriations.

Figure 5. Understanding the Federal Budget Process

1. Budget Resolution

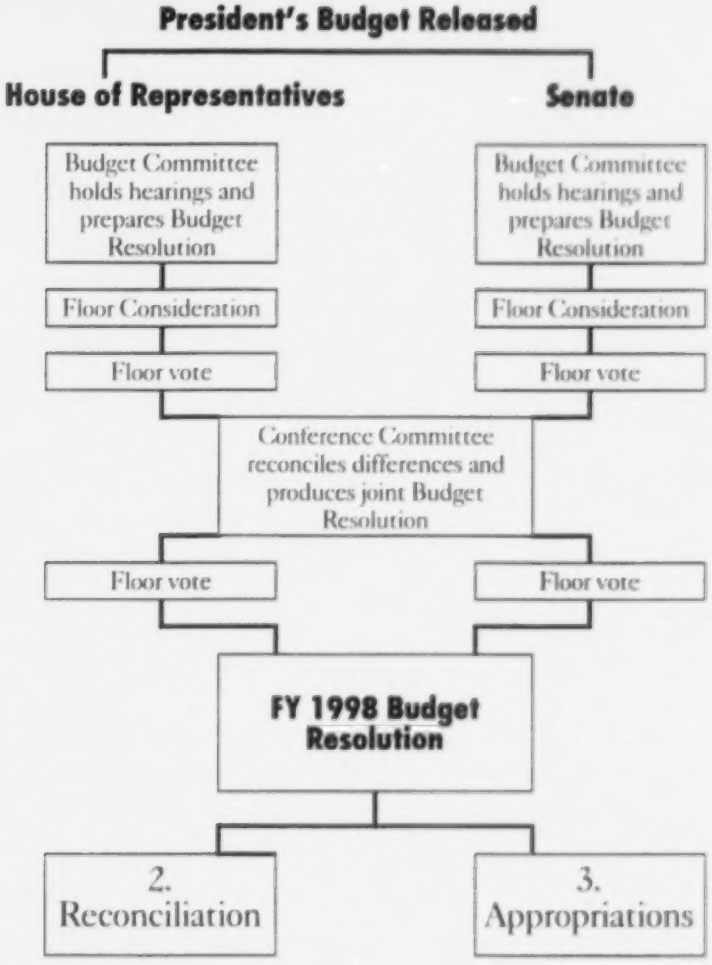


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Figure 5. Understanding the Federal Budget Process (cont.)

2. Reconciliation Process

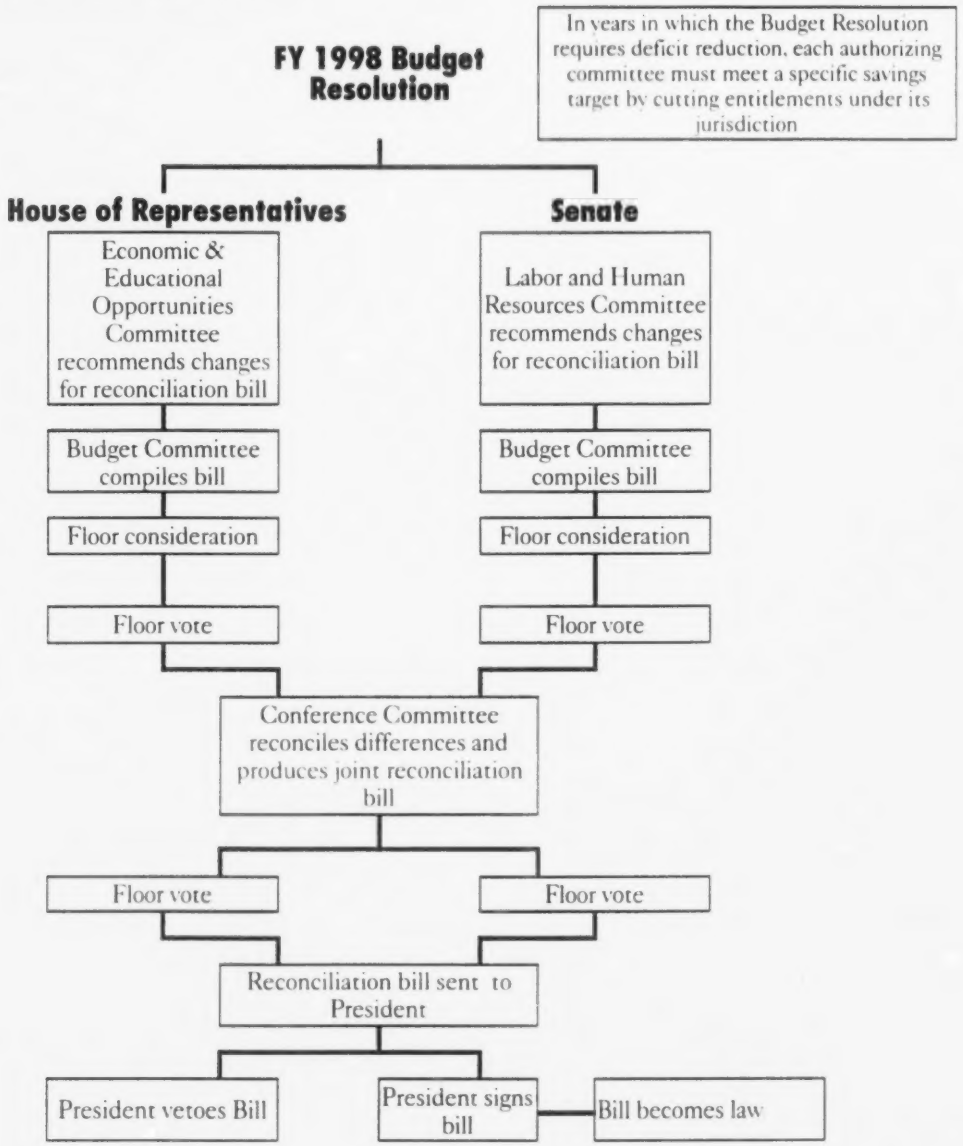
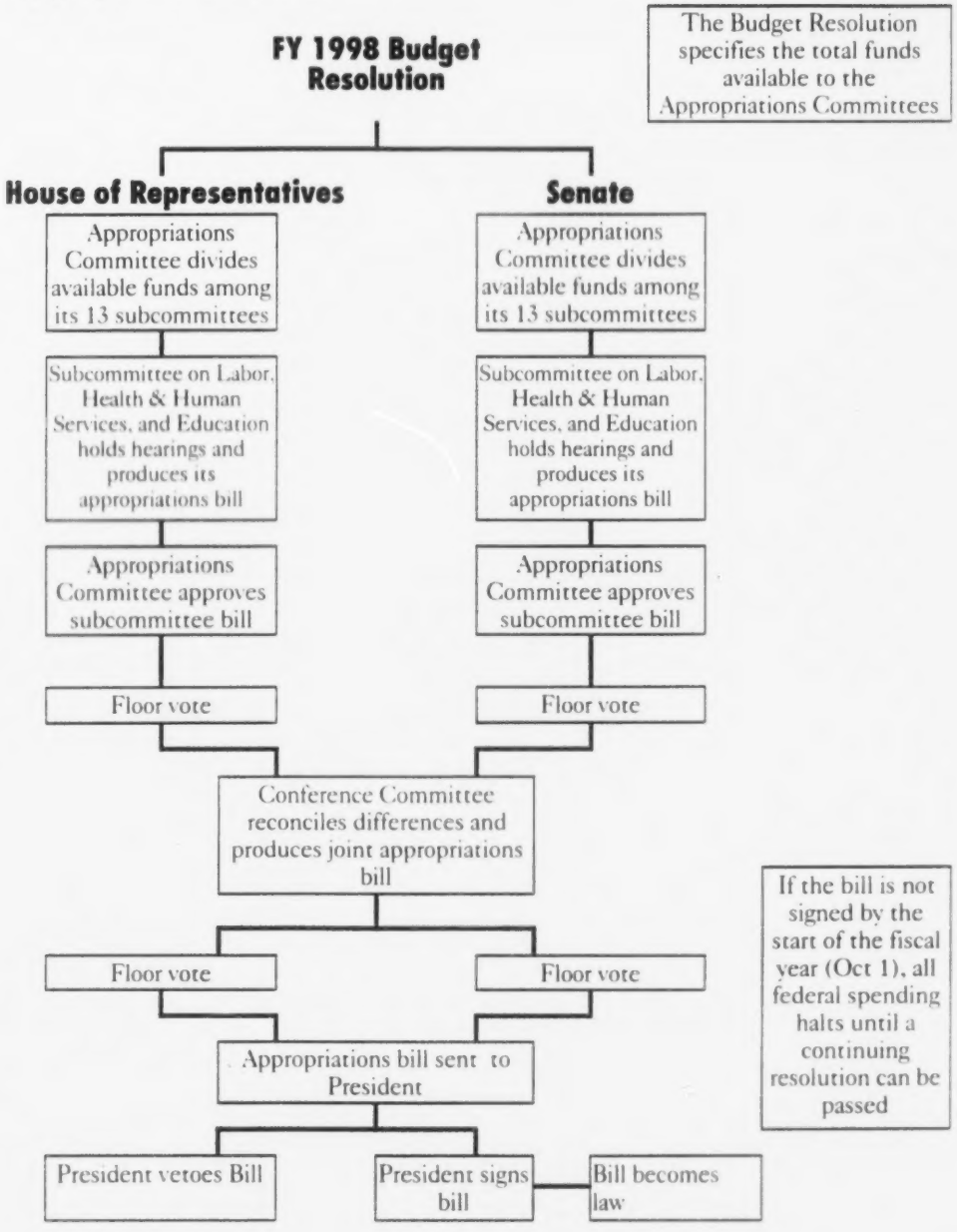

FY 1998 Budget Resolution
In years in which the Budget Resolution requires deficit reduction, each authorizing committee must meet a specific savings target by cutting entitlements under its jurisdiction
House of Representatives
Senate
Economic & Educational Opportunities Committee recommends changes for reconciliation bill
Labor and Human Resources Committee recommends changes for reconciliation bill
Budget Committee compiles bill
Budget Committee compiles bill
Floor consideration
Floor consideration
Floor vote
Floor vote
Conference Committee reconciles differences and produces joint reconciliation bill
Floor vote
Floor vote
Reconciliation bill sent to President
President vetoes Bill
President signs bill
Bill becomes law

Figure 5. Understanding the Federal Budget Process (cont.)

3. Appropriations Process


FY 1998 Budget Resolution
The Budget Resolution specifies the total funds available to the Appropriations Committees
House of Representatives
Senate
Appropriations Committee divides available funds among its 13 subcommittees
Appropriations Committee divides available funds among its 13 subcommittees
Subcommittee on Labor, Health & Human Services, and Education holds hearings and produces its appropriations bill
Subcommittee on Labor, Health & Human Services, and Education holds hearings and produces its appropriations bill
Appropriations Committee approves subcommittee bill
Appropriations Committee approves subcommittee bill
Floor vote
Floor vote
Conference Committee reconciles differences and produces joint appropriations bill
If the bill is not signed by the start of the fiscal year (Oct 1), all federal spending halts until a continuing resolution can be passed
Floor vote
Floor vote
Appropriations bill sent to President
President vetoes Bill
President signs bill
Bill becomes law

Case Study: The U.S. Department of Education's Budget for FY 1998

Consider the following case study that uses the U.S. Department of Education's budget for FY 1998 as an example of how the budget process works.

The process begins in the **Executive Branch** and continues as follows:

1. Beginning in the summer of 1996, the different federal agencies, including the Department of Education, begin to determine what they need for programs for FY 1998.

2. The Department of Education submits its funding request to the Office of Management and Budget (OMB) in the fall of 1996.

3. OMB collects all of the federal agencies' requests and fits them into the President's overall political/economic strategy for FY 1998.

4. OMB then provides the Department of Education with a budget reflecting the President's priorities and funding level for the agency. This happens in December of 1996. This process is called the "Passback."

5. The Department of Education reconfigures its budget to meet the Presidential priorities and submits the new version to OMB.

6. The President releases his budget request the first Monday in February of 1997.

The budget request is now ready for review by the **legislative branch**. The series of events follows:

1. After the President releases the budget request, the House and Senate authorizing and appropriating committees submit their "views and estimates" to the Budget Committees. The "views and estimates" estimate the funding level needed by each of the committees.

2. The Budget Committees use the President's budget request and the "views and estimates" to begin work on a concurrent budget resolution. The budget resolution is non-binding and sets out an overall 5-year budget plan. The budget resolution is supposed to be adopted by April 15. It does not need to be signed by the President.

3. Using the budget resolution as a guide, the Congress starts the appropriations process.

4. If the budget resolution calls for spending cuts that would change the tax laws or entitlement programs, there must be a reconciliation bill to address these changes.

5. On May 15, even if a budget resolution has not been passed, the 13 subcommittee chairmen of the House Committee on Appropriations meet behind closed doors and divide the discretionary funds among the subcommittees. This is called the 602(b) allocations.

6. Each appropriations bill must go through the relevant appropriations subcommittee (the Subcommittee on Labor, Health and Human Services, and Education Appropriations handles education appropriations), and then must pass the full Appropriations Committee, and the House floor. The House is supposed to be completed with all appropriations bills by June 30.

7. After passage in the House, the Senate's relevant appropriations subcommittee takes up the bill. Once through the Senate floor, the Senate and House versions of the appropriations bill are conferenced, passed again by each body, and finally signed by the President (should be finished October 1).

The Regulatory Process

Once your persistence and knowledge has paid off, and the law you've fought so hard for is enacted, your vigilance should not end there. Often, a law is intentionally vague, leaving it up to the overseeing regulatory agency to issue a rule that specifies the law's intent. For example, since the U.S. Department of Education's Office of Special Education and Rehabilitative Services (OSERS) is the agency in charge of implementing the Individuals with Disabilities Education Act (IDEA), it is the agency responsible for the development and monitoring of the law's

regulations. The Office of Educational Research and Improvement (OERI) oversees the Javits Gifted and Talented Students Act. Other federal regulatory agencies which might be charged with implementing a law related to individuals with exceptionalities include the U.S. Department of Health and Human Services (HHS), the U.S. Department of Justice (DOJ), and the Equal Employment Opportunity Commission (EEOC).

There are many definitions of what a regulation is; however, most political scientists and economists generally agree on the following: first, regulation transfers some amount of private discretion to the public sector; and second, it entails sanctions to discourage undesired conduct. Federal regulatory agencies use two procedures for writing and enforcing their regulations: adjudication and rule making. Adjudication is a process through which the agency deals with the activities of a specific company or companies.

Rule making is a process used to write standards and regulations for products and services. When an agency wants to propose a rule, it must give general notice in the ***Federal Register***.

The Federal Register. The ***Federal Register*** is the basic tool for finding out about agency proposed rules, meetings, and adjudicatory proceedings. The rules and regulations that appear daily in the ***Register*** are codified by subject title in the ***Code of Federal Regulations (CFR)***, which is updated annually.

Documents contained in the ***Federal Register*** generally fall under one of the following headings:

- ***Proposed Rules.*** The format for publishing a proposed rule is as follows: The entry contains a brief description of the action; the nature of the action (proposed rule making, extension of public comment period, etc.); a summary of the proposed rule; the deadlines for receiving public comments and/or dates of public hearings; and a detailed supplementary section. An "advance notice of proposed rule making" is published in cases where a rule is being considered but the agency had not developed a concrete proposal.
- ***Rules and Regulations.*** With a few exceptions, federal agencies are required to publish final rules and regulations in the ***Federal Register*** 30 days before they are to take effect. Each entry in this section usually contains a descriptive heading of the change, the type of action involved (e.g., a final rule, a termination of rule making or proceeding, a request for further public comment); a brief summary of the nature of the action; and the effective date. This is followed by supplementary information, including the text of the change in the regulation. The supplementary information on final rules must summarize comments received about the rule, what action was taken on them, and why.
- ***Notices.*** This section contains documents other than rules or proposed rules that are applicable to the public. Notices of hearings and investigations, committee meetings, and agency decisions and rulings are examples.
- ***Sunshine Meetings.*** Notice of open agency meetings are printed in the ***Federal Register***. Each entry contains the agency's name; time, date, and place of the meeting; a brief description of the subject; and supplementary information.

Getting Involved

Once a law has been passed, you should offer your assistance and guidance to the agency that will promulgate the regulations for the Act, to help make sure that the regulations appropriately reflect the law's intent. Respond to the call for public comment during the proposed rule stage, whether it be orally or in written comment form.

You might also want to attend the open agency meetings that are announced in the ***Federal Register***. That way, you can stay abreast of the issues that the agency is and will be focusing on.

Understanding the structure of the Offices and Divisions in the Department of Education, both at federal and state levels, will help you advocate on behalf of the profession and children with exceptionalities. Knowing who oversees what areas will allow you to make quick contacts with persons who are skilled in your particular area of concern. Often, agency personnel have a good feel for the special education climate and may be able to provide insight as to which groups or individuals may support or oppose your goals.

Steps for Success

Do not become mired in the details of the legislative process. It is more important that you prepare your materials, organize your coalition, and locate and enlist the commitment of your legislative champion. These are the things that only you can do. The members who support your issue and their staffs will help with the legislative details.

You should carefully monitor the many different places your bill could die. For example, depending on where your bill happens to be in the process, you might want to modify your advocacy strategies:

- ***Subcommittee***. In subcommittee, there are fewer members to influence. Because there are also fewer issues for the subcommittee to address, members and their aides can be persuaded to learn more about a particular issue. Get to know the members and aides of the subcommittee (preferably before you need them to approve your bill) and serve an informative function for them. At this stage, it is important to present as much useful information as possible.
- ***Committee***. At this level, many legislators have already made up their minds on an issue. Or, they are waiting to hear what their constituents think. This is a time of heightened pressure from advocacy groups. It becomes increasingly harder to change a member's mind at the committee stage, and as a result it is not always the best strategy to rely on aides to get your message through. Rather, at this stage it is important to activate grassroots efforts to mobilize constituents to target their legislators.
- ***House/Senate Floor***. At this point, grassroots efforts must intensify with a flooding of phone lines, faxes, letters (if time allows), and e-mail.

In any case, knowing where your bill is in the legislative process will enable you to select the best strategy for influence.

You may also have to serve as the bridge between the two legislative chambers, where your tactics may radically differ. In some states, each house is under the control of a different party. Even when controlled by the same party, communication between them may be sparse. Often, the best information a good advocate can offer concerns the other chamber's activities.

Meet with or call your legislative champion frequently to find out what he or she needs you to do. Arrange for as many other members as possible to be contacted by their constituents—in person, by letter, or by phone—in support of your measure. Identify and target key committee members and important swing votes. Organize small advocacy teams—no more than three or four carefully selected persons who come from the particular member's district, who are known by him or her, or who will be considered to be important—to meet and work these key members.

Prepare packets of one-page fact sheets and background materials that you can leave behind. These materials should introduce and explain your organizational network and/or your coalition. They should lay out the facts about children and youth with exceptionalities and the arguments for the specific issues you are addressing.

Keep track of your bill's progress through the system. Timing is very important. Debrief your troops constantly. Remember that things can happen quickly during short legislative sessions. Keep a running tally of your

supporters and opponents so that you can direct your efforts most efficiently.

Always keep your eye on the opponents of your bill. While you work for passage of your own bill, you may have to oppose rival legislation that would negate your efforts or cause confusion when implementation occurs.

State Government

Obviously, there are similarities and differences between the federal government and state governments. While it is definitely helpful to know how your state government works, it is beyond the scope of this module to provide specifics for each state in the United States. Rather, what follows is an overview of information that should be collected for your state and made available to participants.

First, from the perspective of advocating for children and youth with exceptionalities, the major difference between Congress and state legislatures is that the state is responsible for education. Laws that are passed at the state level contain "enabling" language that allows the state to provide education. Therefore, it is important to fully understand the legislative process in your state:

- How frequently does your legislative session meet?
- What are the houses called?
- What is the committee structure?
- Who is your local representative (in some states this body is called the state house of representatives, but in others it is called the house of delegates)?
- Who is your state senator?
- How have your representatives voted on education-related issues?
- What department in your state is responsible for issuing any education-related policies and/or regulations?
- Is there a weekly journal (sometimes called a weekly daily) that identifies bills coming up for review?

A good place to obtain this information is your state capital. State legislature information can be found in the ***Election Results Directory*** (1995 edition), "A Complete Listing of State and Federal Legislative and Executive Branch Officials," from the National Conference of State Legislatures, (303) 830-2054. Another source is the League of Women Voters, (202) 429-1965.

Further Reading

If you are interested in learning more about how the federal government works, consider the following sources.

U.S. Department of Education (Fall 1995). ***A teacher's guide to the U.S. Department of Education - Fourth Edition.*** Contact the U.S. Department of Education at 1-800-USA-LEARN. Or at the web site:

http://www.ed.gov/pubs/guides.html

Pullan, D. (1974-1995). ***The U.S. Congress Handbook***. Available for $12.95 from the U.S. Congress Handbook, P.O. Box 566, McLean, VA 22101.

Gallagher, J.J. (1981). Models for policy analysis: Child and family policy. In (R. Haskins & J.J. Gallagher, Eds.), ***Models for analysis of social policy: An introduction.*** (pp. 37-77). Norwood, NJ: Ablex Publishing Corporation.

The CEC Department of Public Policy also provides a variety of resources, including:

- An organizational chart highlighting the offices within the U.S. Department of Education, or a detailed breakdown of the Office of Special Education Programs (OSEP), which is within OSERS.
- Current listings of members on various U.S. Senate and House appropriations, budget, and authorizing committees and subcommittees.
- E-mail updates on the status of current legislation that affects students with exceptionalities. For regular updates, check CEC's web site at:

  http://www.cec.sped.org

In addition, there are a number of resources you might find useful.

Federal Register. Includes federal agency regulations, proposed regulations, changes and other legal documents of the executive branch.

Contact the Superintendent of Documents, U.S. Government Printing Office, 732 North Capitol Street, Washington, DC 20402, or call (202) 512-2465.

Congressional Record. The public proceedings of each house of Congress are printed and published for each day that one or both houses are in session in the ***Congressional Record***. Contact the Superintendent of Documents, U.S. Government Printing Office, 732 North Capitol Street, Washington, DC 20402, or call (202) 512-1800.

U.S. Congress Handbook. Describes how Congress is organized and operates; includes Members' pictures, biographies, committees, addresses, phone numbers, FAX numbers, and key staffers; includes listings of all committees and their members; includes White House staff and contact information, members of the Administration's Cabinet, the U.S. Supreme Court, federal agencies, and governors. The 1996 ***Handbook*** price was $12.95. Send check or money order to Box 566, McLean, VA 22101, (703) 356-3572.

U.S. Government Manual. The official directory of federal government departments and independent agencies, the ***Manual*** describes the purposes and programs of most government agencies and lists top personnel for those agencies. Contact the Superintendent of Documents, U.S. Government Printing Office, 732 N. Capitol Street, Washington, DC 20402, or call (202) 512-2465.

Government Printing Office. Executes orders for printing and binding placed by Congress, federal departments, and agencies. Prepares and distributes about 17,000 different publications through sales by mail and at GPO bookstores.

Listing of State Legislators. You can often find a listing of your legislators' addresses and phone numbers by calling your state League of Women Voters. For example, in New Jersey, the document is called the ***New Jersey Citizen's Guide to Government***, and it is published annually. Contents include voting information, communicating with elected officials, listing of legislative districts, state executive officials, information on county and municipal governments, and information about your state courts, as well as an appointment calendar for the year.

There are also a number of *web sites* you might find helpful.

If you are interested in legislative issues, then consider the following:

U.S. House of Representatives:
http://www.house.gov

House Economic and Educational Opportunities Committee
http://www.house.gov/eeo/welcome.htm

U.S. Senate
http://www.senate.gov

Thomas
http://thomas.loc.gov

Legislative Branch
http://lcweb.loc.gov/global/legislative/congress.html

Congressional Record
http://www.access.gpo.gov/su_docs/aces/aces150.html

Congressional Quarterly
http://www.cq.com/

Find Out How Congress Voted
http://www.time.inc.com/cgi-bin/congress-votes

E-mail Congress
http://www.infi.net/%7Ebartlett/email.htm

Library of Congress
http://www.loc.gov

Univ. of Virginia Office of Special Education
http://curry.edschool.virginia.edu/go/specialed

If you are interested in Executive Issues, then check out the following:

The White House
http://www.whitehouse.gov/WH/Welcome.html

U.S. Department of Education (ED)
http://www.ed.gov

ED Budget News
http://www.ed.gov/news.html#budget

Social Security Administration
http://www.ssa.gov/SSA_Home.html

Government Printing Office (GPO)
http://www.access.gpo.gov/su_docs/

Federal Register
http://www.access.gpo.gov/su_docs/aces/aces140.html

Regional Educational Labs
http://www.nwrel.org/national/regional-labs.html

There are a number of web sites focusing on judicial issues:

Federal Judicial Center
http://www.uscourts.gov/

Labor Relations Press (LRP) Publications
http://www.lrp.com/ed/

For state and local issues, try:

State and Local Government
http://lcweb.loc.gov/global/stategov.html/#info

Governmental Process Workshop

This section provides you with ideas for introducing how the government works to a group of special educators who are seeking to fine-tune their advocacy skills. Specifically, the objectives of the session or workshop are:

- To assist participants in developing a knowledge base about how government works.
- To engage participants in discussion concerning how they can use this knowledge to strengthen their advocacy efforts.

The session is organized as a one-hour presentation, which can be expanded if time permits. *Figure 6* presents a sample agenda.

Warm-Up Activity

The purpose of the warm-up activity is to find out participants' prior knowledge of and experience with how government works. In addition to setting the agenda for the session, the following activities are offered as examples of opportunities you might use to help participants become engaged in activating and sharing their prior knowledge.

Hi! Everything I Needed to Know I Learned in High School Civics

Designed as an ice-breaker, this activity serves two purposes: to allow for introductions and to orient participants' thinking to the topic at hand. The activity is facilitator-directed and it should be done at the beginning of the workshop session. As participants introduce themselves, they include a brief statement of the most valuable thing they learned in high school civics.

Or, as a variation, they might also include one thing they learned that was a misconception.

Materials: Use the blackline master in *Appendix 2A* to create an overhead. You will also need an overhead projector.

Procedures: Ask participants to introduce themselves as they normally would do (e.g., name, position, where from), but to also share the most important thing that they learned in their high school civics class. Give them several minutes to reflect on their high school experience. As they share their important learnings, write these on the overhead.

If you are working with a small, manageable group, conduct the activity with the entire group. If working with a large group, you might consider conducting this activity by having participants pair up and share their experiences with each other first, introduce each other and share what they've learned.

After everyone has had a chance to introduce themselves, review the list of learnings. Ask the group which learnings are most relevant to their work as advocates.

Figure 6: Agenda

Time	Activity	Purpose	Process
5 minutes	Welcome & Introductions	Set positive tone; Clarify Expectation	Facilitator welcomes participants; introduces self; provides overall goal of the session.
15 minutes	Participant Introductions and Warm-Up Activity	Set positive and interactive tone; activate prior knowledge.	Participants introduce themselves and participate in warm-up; facilitator orients group to content to be presented.
20 minutes	Content Presentation with questions and answers	To transfer knowledge to participants; provide participants with opportunity to ask questions.	Facilitator shares information, either in mini-lecture or informal presentation.
15 minutes	Application Activity	To assist participants in applying their knowledge; encourage participants to want to do more with their knowledge.	Participate in activity and/or discussion about next steps.
5 minutes	Closure	"Wrap-up" session & provide opportunity for feedback.	Facilitator thanks participants; encourages feedback; gets a sense of those participants who want to participate further.

This activity makes a nice segue into a discussion of what advocates need to know to influence the governmental process.

Civics Quiz

In this activity, participants are challenged to recall their knowledge about civics.

Materials: Make handouts out of the blackline master in *Appendix 2B*. Or, if you are working with a large group, make an overhead.

Procedures: Tell participants that you are going to give them a true or false quiz that tests their knowledge about the congressional legislative process. Either pass out the quiz to each participant or use the overhead and read each statement aloud.

As a variation, you might divide the group into teams and play "baseball." Draw a baseball diamond on the overhead or chart paper. Assign a symbol for each team. The first team "up to bat" gets the first question. If they are right, draw their symbol on first base. If they are wrong, then Team 2 gets a chance to steal their base. Next give a statement to Team 2 and repeat the process until one team scores a run.

New Jersey CAN Coordinator **Scott Rossig** offers another variation of the activity that utilizes a "Jeopardy" game format. Split the group into teams. The facilitator reads the answer, and the teams try to provide the question. In order to give a question, the team must be the first to "ring in."

The debriefing period offers an excellent opportunity to share critical information and as such, makes a natural transition to the prevention portion of the session.

Answer Key

1. **True**. There are 100 Senators and 435 Congressional Representatives with voting privileges in the U.S. Congress. There are two senators per each state, but the number of representatives is based on population. Non-voting members represent the District of Columbia and the U.S. Territories.

2. **True**. Each Representative represents between 500,000 and 600,000 people.

3. **True**. The Speaker of the House is third in line to the Presidency.

4. **True**. Each Congress is made up of two sessions. The first session begins in January, after the new Congress is sworn in, and runs until the holiday recess in December. The second session begins in January and runs until Congress adjourns for the year.

5. **False**. The party in the majority selects a chairperson for each committee, and the minority party selects a ranking member. Traditionally, the selection of a committee chairperson is made based on seniority within the majority party.

6. **False**. There are two processes: *authorization*, which allows for funding, and *appropriations*, which sets the funding.

7. **False**. Even the president cannot introduce a bill—only a sitting representative or senator can do so.

8. **False**. Bills are introduced continually, but many are never addressed by Congress.

9. **False**. Only the House has a Rules Committee.

10. **False**. The conferenced bill must be subsequently passed by both the House and Senate.

11. **False**. If the Congressional leadership says passage of a bill will occur in April, it might not automatically pass in April. Many things can hold up a bill's passage (e.g., the Senate can filibuster a bill).

12. **False**. Congress can override the President's veto.

13. **True**. After a bill is sent to the President for his signature, Congress might recess. If Congress remains in recess for 10 days and the bill is not signed, it is automatically vetoed. (Extra points if you can name this procedure! It is called a pocket veto.)

14. **False**. The President's budget is only a request.

15. **True**.

16. **True**. All appropriations bills must begin in the House. All spending and tax bills must begin in the House.

17. **True**. In fact, these training sessions will help you affect both the process and the outcome.

Race to Define the Terms

In addition to understanding the rules by which your state legislators and the Congress operate, you should also understand the technical language or jargon. In this activity, groups are given a list of terms and an assortment of definitions. Their challenge is to match the terms with the definitions and be the first to finish.

There are two variations of this activity. In the first variation, participants can be given the terms and asked to define them. Groups then share their definitions. In the other variation, groups are given slips of paper (or index cards) with the terms and definitions written one per card. The first team member draws a card and has three minutes to give clues—"I am thinking of a term that describes what the president does when he or she does not approve of a bill." The other team members must guess the term. The process continues until all cards are addressed.

Materials: A list of terms and a list of definitions are found in *Appendix 2C*. A complete glossary is found in *Appendix 2D*. Pick as many as you have time for.

Procedures: Place participants in teams. Pass out the list of terms and the definitions. Tell them they have five minutes to match the definitions with the terms. After the time is up, ask the teams to share their scores. Discuss any terms that all groups missed. Address any questions individuals have.

This activity makes a nice segue into a discussion of the legislative process and why it is important to have a basic understanding of processes and terminology.

Answer Key. Term-Definition: 1-EE; 2-BB; 3-E; 4-T; 5-A; 6-G; 7-F; 8-J; 9-P; 10-W; 11-H; 12-C; 13-V; 14-M; 15-FF; 16-HH; 17-GG; 18-S; 19-B; 20-AA; 21-CC; 22-X; 23-K; 24-DD; 25-U; 26-N; 27-Y; 28-R; 29-Q; 30-JJ; 31-L; 32-O; 33-D; 34-Z; 35-I.

What Frustrates You?

This activity was suggested by **Joe Ovick**, past Chair of CEC's Advocacy and Governmental Relations Committee. If you are working with individuals who have had experience with their state legislators, ask: ***What is it about state legislators or the state process that frustrates you?*** Use the answers from the group as a starting point for launching into a discussion of the processes at the state level.

Materials: An overhead on which you can record participant answers (a blackline master is found in *Appendix 2E*).

Procedures: Ask your group to think about their experiences trying to influence the state legislative process. Ask: What is it about state legislators or the state process that frustrates you?

As participants share their responses (which might include such things as obtaining information, figuring out the priorities of legislators, party turnover, intimidation, budgetary constraints), record them on the overhead.

This discussion can be followed with a presentation concerning state processes.

Content Presentation

There are several topics that should be covered during this portion of the agenda:

- An overview of how a bill becomes law (see *Appendix 2F* for an overhead and/or a note taking guide for participants).
- An overview of the authorization and ap-

propriations process (use the overhead in *Appendix 2G* as a guide). *Appendix 2H* contains a graphic depiction of the budget resolution process. If you are focusing on the budgetary process, consider using the handout in *Appendix 2I* as a guide.

- An overview of the regulatory process.
- Information about the state government process.
- Why advocates need to understand the governmental process.

Depending on your group, select all or some of these topics. You might want to include additional topics. In any case, what is important is that participants leave with a clear understanding of the basic nuts and bolts of the governmental process and how such knowledge can support their advocacy efforts.

Next Steps—Application Activities

In this final part of the agenda, you will need to wrap-up and give the participants a strategy for using the information that you just covered. At the very least, you will need to thank participants for their time, leave them with a way to contact you for further information (see *Appendix 2J* for cover sheet), and provide them with a tangible way to put their knowledge to work (e.g., get involved with the CEC Children and Youth Action Network, attend additional training events). If you haven't already done so, you should also distribute CEC membership information and forms (see *Appendix 2K*).

Following are several sample activities that might also be used to encourage participants to apply the information.

Fact Sheet

The purpose of this activity is to help participants collect information on their own state legislative activities.

Materials: Use the blackline master in *Appendix 2L*.

Procedures: Pass out the handout and review the information with the participants. Suggest that they fill in the blanks.

Following the Dailies

In this activity, you provide participants with several months of back issues of your state legislature's weekly journal. Pick an issue that you know was covered and ask them to track its progress over time.

Materials: Back issues of your state legislature's weekly journal.

Procedures: Introduce the concept of dailies to the participants. Pass out examples and orient the group to how these publications can be used. Have ready several bills that are featured in your selection of dailies. Direct the group to track the bill over time. Debrief the activity.

If an issue is currently of interest to participants, encourage participants to track the issue in future dailies. If you are forming an advocacy campaign, use this as an opportunity to solicit volunteers to provide this service.

Where's the Bill Now?

In this activity, participants determine where a particular bill is in the legislative process and discuss next steps for advocacy efforts. Note: This activity will work at the state and federal levels during certain time periods.

If you are working with a large group, consider doing this activity for several bills and dividing participants into small groups to complete the task.

Materials: Identify several bills that are of importance to participants. Determine the stage where each bill currently is. Plot the information on the handout in *Appendix 2F*.

Procedures: Discuss the bill and its current status with participants. Ask them to suggest how they might influence the legislative process.

Suggest that they might start by identifying the members of the committee or subcommittee who are currently deliberating over the bill. Have them find out for each committee/subcommittee member:

- Position on the bill
- District represented
- Previous voting record on bills representing similar issues

Ask them also to name any other CEC members or special educators who they know who might live in the legislator's district.

If you are presenting Module 3 to this same group, use the results of this activity as a foundation to build lobbying skills.

How the Government Works

What I Know	What I Thought I Knew

Quiz: The Legislative Process

(aka...do you remember your high school civics class?)

True or False

1. *There are 100 Senators and 435 Congressional Representatives in the U.S. Congress.*
2. *Each Representative represents approximately the same number of voters.*
3. *The Speaker of the House is 3rd in line to the Presidency.*
4. *Each Congress is composed of two houses and lasts two years.*
5. *Good looks determine who chairs a committee.*
6. *If a law is enacted authorizing $245 million for public school libraries, the check is in the mail.*
7. *Any U.S. citizen can introduce a bill in Congress.*
8. *Once a bill is introduced, Congress must take some action on it.*
9. *Before floor passage, both the House and the Senate must send legislation to the Rules Committee.*
10. *Once a bill is conferenced, the conference version is sent to the President for his or her signature.*
11. *If the Congressional leadership says passage of a bill will occur in April, it will pass in April.*
12. *A bill has to be signed by the President in order to be enacted.*
13. *If, after a bill is sent to the President for his/her signature, Congress recesses for 10 days and the President does not sign the bill, the bill is automatically vetoed.*
14. *The President's budget, introduced at the beginning of the year, sets the appropriations level for each federal program.*
15. *If the President disagrees with spending federal money on a program included in a Congressionally passed appropriations bill, he/she can eliminate that line item and still sign the bill into law.*
16. *All appropriations bills must begin in the House.*
17. *Everyone can affect the Congressional political process.*

Terms

1. *Act*
2. *Amendment*
3. *Appropriations Bill*
4. *Authorization Bill*
5. *Bill*
6. *Budget*
7. *Calendars*
8. *Clean Bill*
9. *Closed Rule*
10. *Cloture*
11. *Committee*
12. *Committee of the Whole*
13. *Committee Report*
14. *Conference Committee*
15. *Congressional Record*
16. *Continuing Resolution*
17. *Expenditures*
18. *Hearings*
19. *Pigeonhole*
20. *Privileged Bills*
21. *Quorum*
22. *Ranking Member*
23. *Report*
24. *Rescission*
25. *Rider*
26. *Seniority*
27. *Session*
28. *Standing Committee*
29. *Subcommittee*
30. *Supplemental Appropriations*
31. *Suspension of the Rules*
32. *Teller Votes*
33. *Unanimous Consent*
34. *Veto*
35. *Whip*

Definitions

A— Legislative proposal introduced in either house (until it has been passed by that house). Designated HR (House of Representatives) or S (Senate) according to the house in which it originates and by a number assigned in the order which it is introduced.

B— Shelving a bill without a final vote; usually refers to blockage by a committee; allows a bill to die by failure of a committee to act.

C— When the House sits as one committee to consider legislation reported by a standing committee before it goes to the floor; the committee debates and amends legislation. Requires only 100 members for a quorum.

D— Usual way of conducting business in the Senate; after morning hour, majority leader asks unanimous consent to consider pending legislation; such requests are rarely objected to; also used in both houses in lieu of a vote on noncontroversial measures.

E— Permits the expenditure of the monies approved by an authorization bill, but usually not to the total permissible under the authorizing legislation. These bills originate in the House and normally are not acted on until their authorization measures are enacted.

F— Arrangements for scheduling legislative business.

G— Document sent to Congress by the President in January of each year estimating revenues and expenditures for the ensuing fiscal year.

H— A subdivision of the House or Senate which prepares legislation for action by the parent chamber or makes investigations as directed by the parent chamber.

I— Chosen by party caucus as an assistant to the floor leader; job is to keep in touch with all members of his party, discover their voting intentions, and get them to the floor for a vote.

J— After a committee has considered and revised a bill, it may rewrite it incorporating its amendments into a new or "clean bill." This bill is given a new number and is the committee's best judgment of superior sections in all versions.

K— Both a verb and a noun, as a congressional term. The act of a committee confirming its findings back to the chamber. Also, the document setting forth the committee's explanation of its actions.

L— In the House a two-thirds majority may suspend the rules and bring a bill directly to the floor; in the Senate, only a majority vote is needed.

M— A group made up of members from both houses; purpose is to iron out differences between House and Senate versions of a bill.

N— Refers to length of uninterrupted service in Congress and specifically on a committee; criterion usually used for determining committee chairmanships.

O— (House) Votes taken in Committee of the Whole by counting Congress members for or against a measure as they walk down the aisle; (until the Legislative Reorganization Act of 1970, there was not a provision for recording this type of vote).

P— (House) prohibits the offering of amendments, thus requiring that the bill be accepted or rejected as reported by committee.

Q— Smaller subject-matter divisions of a committee; facilitates specialization and division of labor.

R— Subgroup of a house of Congress that is permanent and continues from one Congress to the next; there are 20 in the House and 17 in the Senate.

S— Committee session for testimony of witnesses. At hearings on legislation, witnesses usually include floor spokesman for their party.

T— Legislation setting up or continuing programs; sets general aims and purposes and may set a ceiling for funding. Must be enacted before appropriations bill is passed.

U— An amendment proposing substantive legislation attached to another bill.

V— Written explanation and justification for recommendations submitted by committee to full chamber after the committee has scrutinized and decided to favorably report a bill. Used by courts, executive departments, and the public as a source of information on the purpose and meaning of a law.

W— A process by which debate can be ended in the Senate. A motion of this type requires 16 senators' signatures for introduction and support of two-thirds of those present and voting.

X— Member of a committee who has more seniority on the committee than any other member of his party. Usually used in reference to the most senior minority party member.

Y— Normally, each Congress consists of two of these, usually beginning in January and ending when Congress adjourns for the year.

Z— Action by the President if he doesn't approve of a bill or joint resolution; he returns it with his objections to the house of origin and the bill may be reconsidered; must receive approval of two-thirds of both chambers to be overridden.

AA— (House) bills that have precedence over normal order of business and do not require Rules Committee action; reports from Committee on Appropriations on general appropriations bills and reports from Committee on Ways and Means on bills raising revenue are these types of bills.

BB— Proposal of a Congressman to alter the language or stipulations in a bill or act. It is usually printed, debated, and voted upon in the same manner as a bill.

CC— Number of members who must be present to conduct business; in the House it is 218 and in the Senate it is 51.

DD— An item in an appropriations bill rescinding, or canceling, funds previously appropriated but not spent. Also, the repeal of a previous appropriation by the President to cut spending, if approved by Congress under procedures in the Budget and Impoundment Control Act of 1974.

EE— Technically, the designation of a bill after it has passed one house of Congress. Also used as a synonym for law. The term for legislation that has passed both houses of Congress and has been signed by the President or passed over his veto.

FF— Daily record of the proceedings and debates of the Senate and House.

GG— The actual spending of money as distinguished from the appropriation of it. Such spending is carried out by the disbursing officers of the administration; appropriations are made only by Congress.

HH— When a fiscal year begins and Congress has not yet enacted all the regular appropriations bills for that year, it passes this type of bill, which funds government agencies at rates generally based on its previous year's appropriations.

JJ— Normally are passed after the regular (annual) appropriations bills, but before the end of fiscal year to which they apply. Also referred to as "deficiencies."

Glossary of Legislative Terms

Act — Technically, the designation of a bill after it has passed one house of Congress. Also used as a synonym for law. The term for legislation that has passed both houses of Congress and has been signed by the President or passed over his veto.

Amendment — Proposal of a Congressman to alter the language or stipulations in a bill or act. It is usually printed, debated, and voted upon in the same manner as a bill.

Appropriations Bill — Permits the expenditure of the monies approved by an authorization bill, but usually not to the total permissible under the authorizing legislation. An appropriations bill originates in the House and normally is not acted on until its authorization measure is enacted.

Authorization Bill — Legislation setting up or continuing programs; sets general aims and purposes and may set a ceiling for funding. Must be enacted before appropriations bill is passed. Occasionally, once prior authorization has run out, an appropriation may be made before a program is reauthorized.

Bill — Legislative proposal introduced in either house (until it has been passed by that house). Designated HR (House of Representatives) or S (Senate) according to the house in which it originates and by a number assigned in the order which it is introduced.

Budget — Document sent to Congress by the President in January of each year estimating revenues and expenditures for the ensuing fiscal year.

Calendars — Arrangements for scheduling legislative business.

Clean Bill — After a committee has considered and revised a bill, it may rewrite it incorporating its amendments into a new or "clean bill." This bill is given a new number and is the committee's best judgment of superior sections in all versions.

Closed Rule — (House) prohibits the offering of amendments, thus requiring that the bill be accepted or rejected as reported by committee.

Cloture — A process by which debate can be ended in the Senate. A motion for cloture requires 16 senators' signatures for introduction and support of two-thirds of those present and voting.

Committee — A subdivision of the House or Senate which prepares legislation for action by the parent chamber or makes investigations as directed by the parent chamber. There are several types of committees. Most standing committees are divided into subcommittees, which study legislation, hold hearings, and report their recommendations to the full committee. Only the full committee can report legislation for action by the House or Senate.

Committee of the Whole — When the House sits as one committee to consider legislation reported by a standing committee before it goes to the floor; the committee debates and amends legislation. Requires only 100 members for a quorum.

Committee Report — Written explanation and justification for recommendations submitted by committee to full chamber after the committee has scrutinized and decided to favorably report a bill. Used by courts, executive departments, and the public as a source of information on the purpose and meaning of a law.

Conference Committee — A committee made up of members from both houses; purpose is to iron out differences between House and Senate versions of a bill.

Congressional Record — Daily record of the proceedings and debates of the Senate and House.

Continuing Resolution — When a fiscal year begins and Congress has not yet enacted all the regular appropriations bills for that year, it passes a joint resolution "continuing appropriations" for government agencies at rates generally based on its previous year's appropriations.

Expenditures — The actual spending of money as distinguished from the appropriation of it. Expenditures are made by the disbursing officers of the administration; appropriations are made only by Congress. The two are rarely identical in any fiscal year; expenditures may represent money appropriated one, two, or more years previously.

Hearings — Committee session for hearing witnesses. At hearings on legislation, witnesses usually include floor spokespersons for their party, who are elected by party caucus.

Pigeonhole — Shelving a bill without a final vote; usually refers to blockage by a committee; allows a bill to die by failure of a committee to act.

Privileged Bills — (House) bills that have precedence over normal order of business and do not require Rules Committee action; reports from Committee on Appropriations on general appropriations bills and reports from Committee on Ways and Means on bills raising revenue are privileged bills.

Quorum — Number of members who must be present to conduct business; in the House it is 218 and in the Senate it is 51.

Ranking Member — Member of a committee who has more seniority on the committee than any other member of his party. Usually used in reference to the most senior minority party member.

Report — Both a verb and a noun, as a congressional term. A committee that has been examining a bill referred to it by the parent chamber (House or Senate) "reports" its findings and recommendations to the chamber when the committee returns the measure. The process is called "reporting" a bill. A "report" is the document setting forth the committee's explanation of its action. House and Senate reports are numbered separately and are designated S. Rept. or H. Rept. Conference reports are numbered and designated in the same way as regular committee reports. Most reports favor a bill's passage. Adverse reports are occasionally submitted, but more often, when a committee disapproves a bill, it simply fails to report it at all. When a committee report is not unanimous, the dissenting committee members may file a statement of their views, called minority views and referred to as a minority report. Sometimes a bill is reported without recommendation.

Rescission — An item in an appropriations bill rescinding, or canceling, funds previously appropriated but not spent. Also, the repeal of a previous appropriation by the President to cut spending, if approved by Congress under procedures in the Budget and Impoundment Control Act of 1974.

Rider — An amendment proposing substantive legislation attached to another bill.

Seniority — Refers to length of uninterrupted service in Congress and specifically on a committee; criterion usually used for determining committee chairmanships.

Session — Normally, each Congress consists of two sessions, usually beginning in January and ending when Congress adjourns for the year.

Standing Committee — Committee whose existence is permanent and continuing from one Congress to the next; there are 20 in the House and 17 in the Senate.

Subcommittee — Smaller subject-matter divisions of a committee; facilitates specialization and division of labor.

Supplemental Appropriations — Normally are passed after the regular (annual) appropriations bills, but before the end of fiscal year to which they apply. Also referred to as "deficiencies."

Suspension of the Rules — In the House a two-thirds majority may suspend the rules and bring a bill directly to the floor; in the Senate, only a majority vote is needed.

Teller Votes — (House) Votes taken in Committee of the Whole by counting congress members for or against a measure as they walk down the aisle; (until the Legislative Reorganization Act of 1970, there was not a provision for recording teller votes).

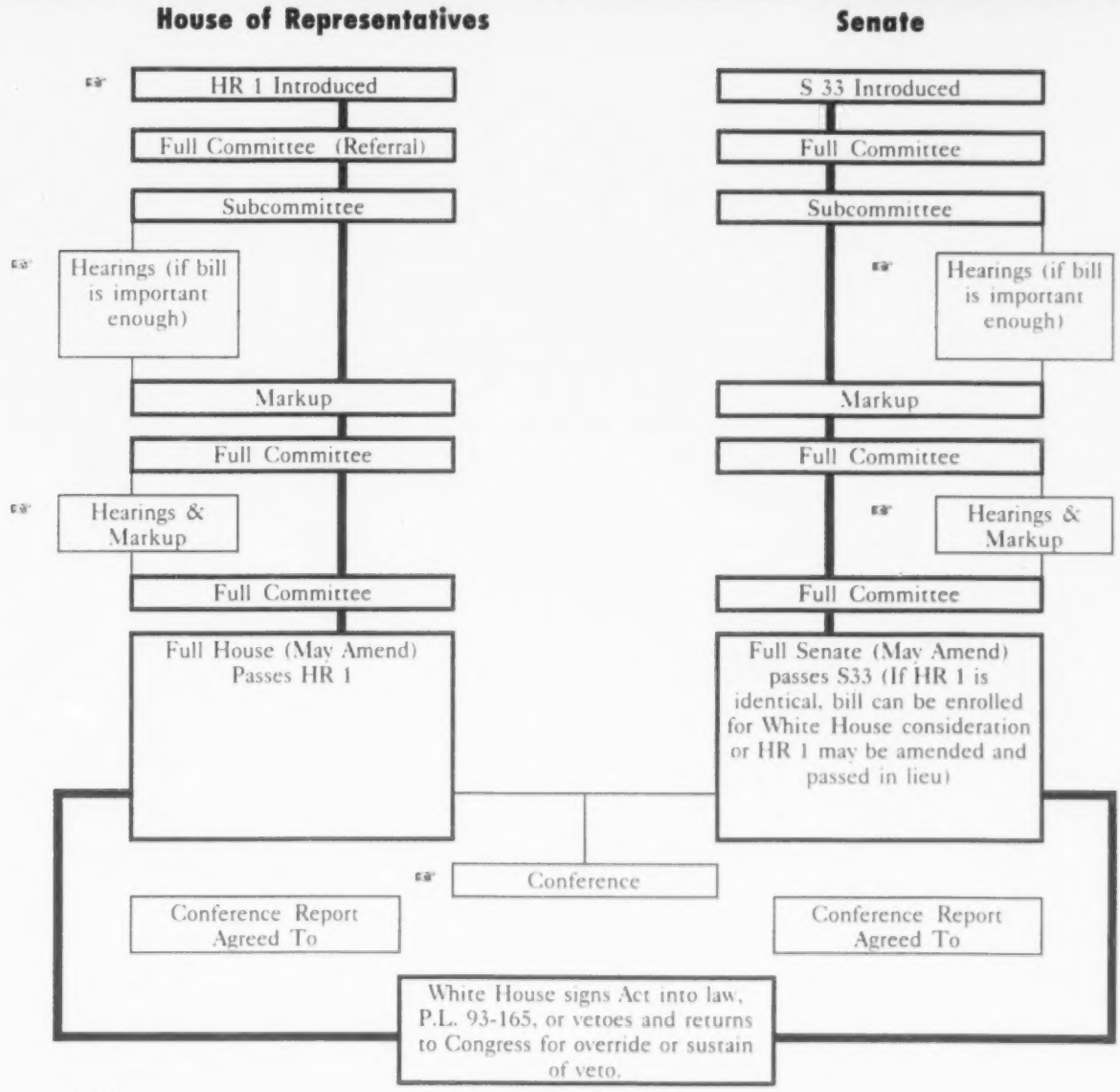
Unanimous Consent — Usual way of conducting business in the Senate; after morning hour, majority leader asks unanimous consent to consider pending legislation; such requests are rarely objected to; also used in both houses in lieu of a vote on noncontroversial measures.

Veto — Action by the President if he doesn't approve of a bill or joint resolution; he returns it with his objections to the house of origin and the bill may be reconsidered; must receive approval of two-thirds of both chambers to become law. When Congress has adjourned, the President may pocket veto a bill by refusing to sign it.

Whip — A member chosen by a party caucus as an assistant to the floor leader; job is to keep in touch with all members of his party, discover their voting intentions, and get them to the floor for a vote.

This Really Frustrates Me!

A Typical Journey for Legislation in Congress


House of Representatives
Senate
HR 1 Introduced
Full Committee (Referral)
Subcommittee
Hearings (if bill is important enough)
Markup
Full Committee
Hearings & Markup
Full Committee
Full House (May Amend) Passes HR 1
S 33 Introduced
Full Committee
Subcommittee
Hearings (if bill is important enough)
Markup
Full Committee
Hearings & Markup
Full Committee
Full Senate (May Amend) passes S33 (If HR 1 is identical, bill can be enrolled for White House consideration or HR 1 may be amended and passed in lieu)
Conference
Conference Report Agreed To
Conference Report Agreed To
White House signs Act into law, P.L. 93-165, or vetoes and returns to Congress for override or sustain of veto.

KEY

Regular Path (thick line)

Optional Step (thin line)

Step where citizen influence may be exerted

A Map to the Congressional Budget and Appropriations Process

Authorization

Budget Resolution (1974)
Reconciliation (1981)
Gramm-Rudman-Hollings (1986)
Budget Summit Agreement (1987) (1989)
Partial Sequester (1989)
Budget Enforcement Agreement (1990)

Appropriation

Committees Involved

Authorizing

House: Economic & Educational Opportunities; Senate: Labor & Human Resources

- Creates and reauthorizes discretionary (i.e. Chapter 1, Pell Grants) and entitlements (i.e., GSL) programs.

- Sets discretionary program "authorized ceilings" for appropriations.

- Estimates cost of entitlements based on authorization.

Appropriations

House & Senate Subcommittees on Labor, HHS, Education

- Annually determines appropriations level for each discretionary program.

- Adopts estimates for entitlement programs.

Revenue

House Ways & Means Senate Finance

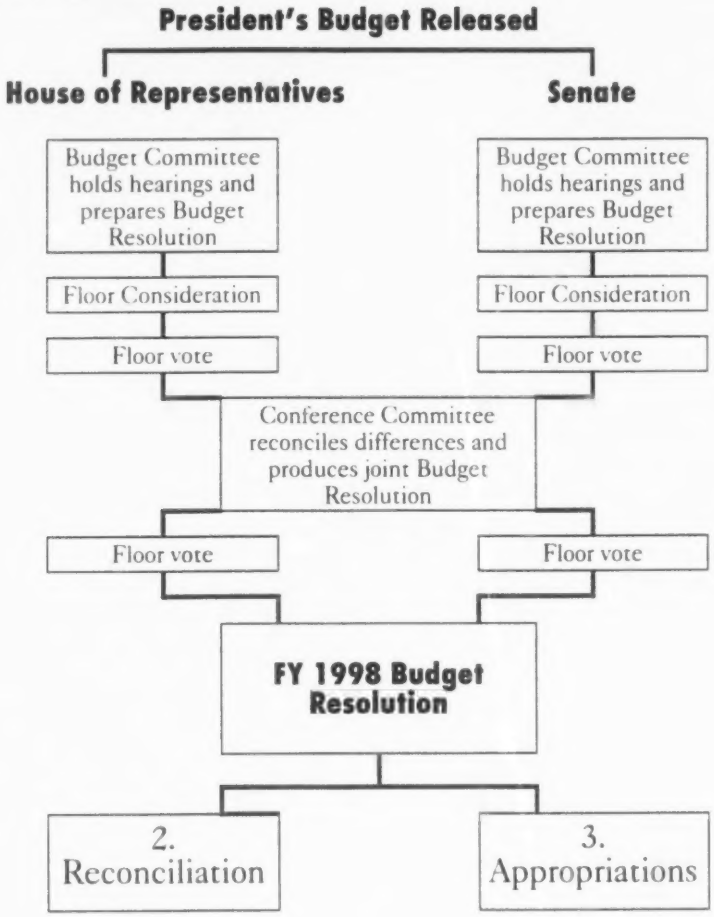
- Authorizes changes in tax code, cuts or raises revenue.

- Creates and modifies major entitlement programs (i.e., Social Security)

After reviewing President's budget request and holding hearings in order to establish the committee's priorities, makes recommendations, "Views and Estimates," to Budget Committees on funding level for programs within their jurisdiction. "Views and Estimates" are due to the budget committee by March 15. Congress has to adopt a concurrent budget resolution by April 15.

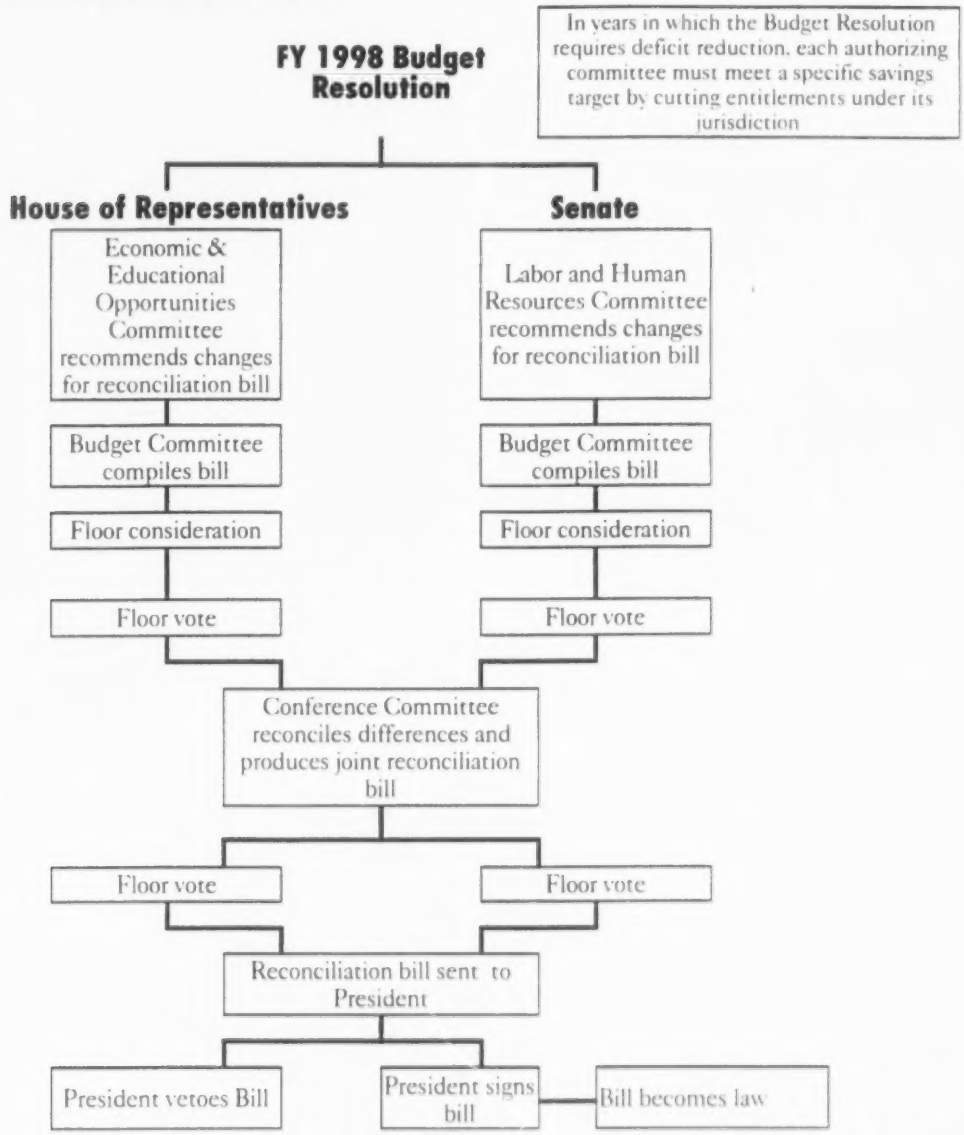
Understanding the Federal Budget Process

1. Budget Resolution



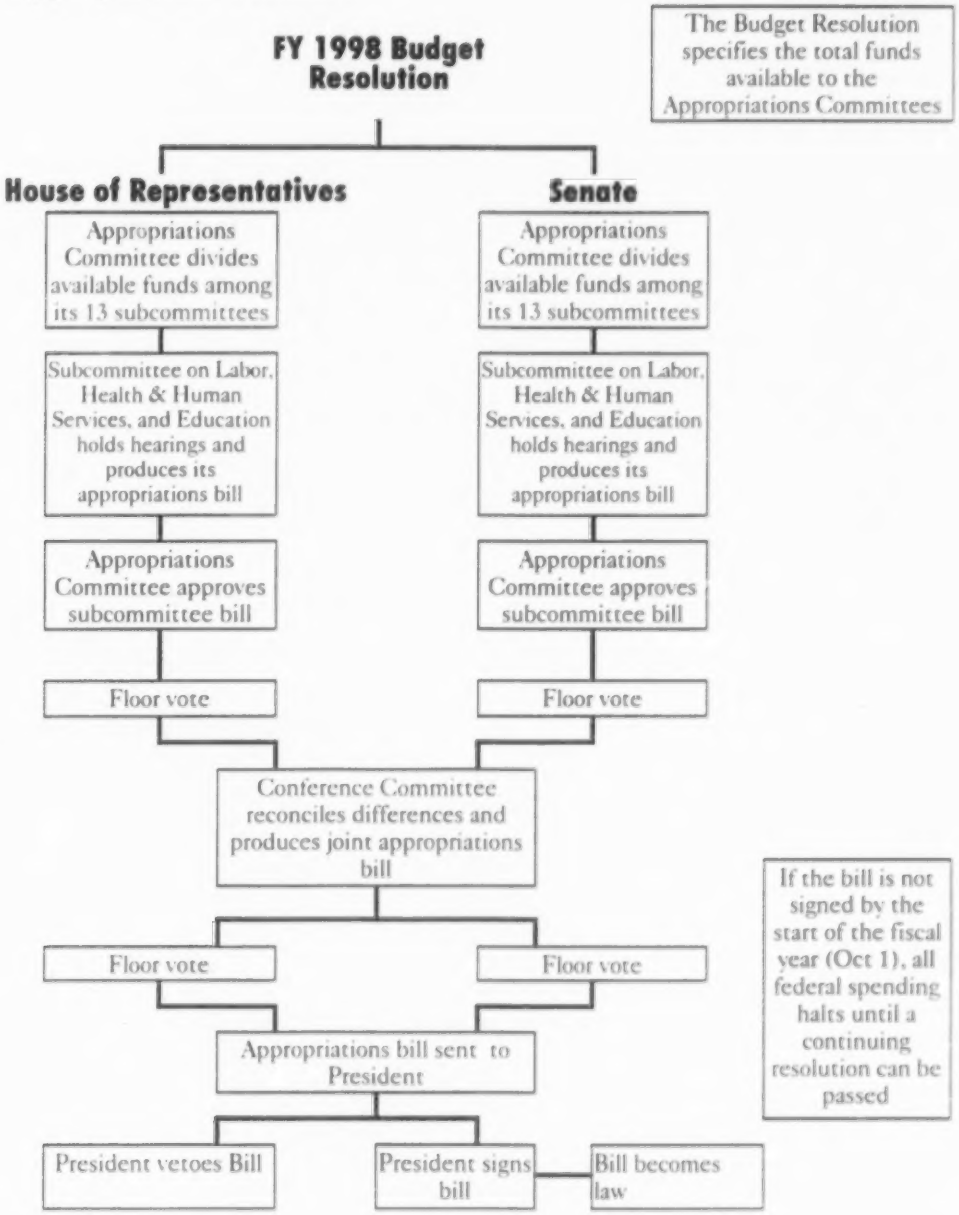
Understanding the Federal Budget Process:

2. Reconciliation Process


FY 1998 Budget Resolution
In years in which the Budget Resolution requires deficit reduction, each authorizing committee must meet a specific savings target by cutting entitlements under its jurisdiction
House of Representatives
Senate
Economic & Educational Opportunities Committee recommends changes for reconciliation bill
Labor and Human Resources Committee recommends changes for reconciliation bill
Budget Committee compiles bill
Budget Committee compiles bill
Floor consideration
Floor consideration
Floor vote
Floor vote
Conference Committee reconciles differences and produces joint reconciliation bill
Floor vote
Floor vote
Reconciliation bill sent to President
President vetoes Bill
President signs bill
Bill becomes law

Understanding the Federal Budget Process

3. Appropriations Process


FY 1998 Budget Resolution
The Budget Resolution specifies the total funds available to the Appropriations Committees
House of Representatives
Senate
Appropriations Committee divides available funds among its 13 subcommittees
Appropriations Committee divides available funds among its 13 subcommittees
Subcommittee on Labor, Health & Human Services, and Education holds hearings and produces its appropriations bill
Subcommittee on Labor, Health & Human Services, and Education holds hearings and produces its appropriations bill
Appropriations Committee approves subcommittee bill
Appropriations Committee approves subcommittee bill
Floor vote
Floor vote
Conference Committee reconciles differences and produces joint appropriations bill
If the bill is not signed by the start of the fiscal year (Oct 1), all federal spending halts until a continuing resolution can be passed
Floor vote
Floor vote
Appropriations bill sent to President
President vetoes Bill
President signs bill
Bill becomes law

An Overview of the Federal Budget Process

Example: The U.S. Department of Education's Budget for FY 1998

Executive Branch

1. Beginning in the summer of 1996, the different federal agencies, including the Department of Education, begin to determine what they need for programs for FY 1998.

2. The Department of Education submits its funding request to the Office of Management and Budget (OMB) in the fall of 1996.

3. OMB collects all of the federal agencies' requests and fits them into the President's overall political/economic strategy for FY 1998.

4. OMB then provides the Department of Education with a budget reflecting the President's priorities and funding level for the agency. This happens in December of 1996. This process is called the "Passback."

5. The Department of Education reconfigures its budget to meet the Presidential priorities and submits the new version to OMB.

6. The President releases his budget request the first Monday in February of 1997.

Legislative Branch

1. After the President releases his budget request, the House and Senate authorizing and appropriating committees submit their "views and estimates" to the Budget Committees. The "views and estimates" estimate the funding level needed by each of the committees.

2. The Budget Committees use the President's budget request and the "views and estimates" to begin work on a concurrent budget resolution. The budget resolution is non-binding and sets out an overall 5-year budget plan. The budget resolution is supposed to be adopted by April 15. It does not need to be signed by the President.

3. Using the budget resolution as a guide, the Congress starts the appropriations process.

4. If the budget resolution calls for spending cuts that would change the tax laws or entitlement programs, there must be a reconciliation bill to address these changes.

5. On May 15, even if a budget resolution has not been passed, the 13 subcommittee chairmen of the House Committee on Appropriations meet behind closed doors and divide the discretionary funds among the subcommittees. This is called the 602(b) allocations.

6. Each appropriations bill must go through the relevant appropriations subcommittee (the Subcommittee on Labor, Health and Human Services, and Education Appropriations handles education appropriations), and then must pass the Appropriations Committee, and the House floor. The House is supposed to be completed with all appropriations bills by June 30.

7. After passage in the House, the Senate's relevant appropriations subcommittee takes up the bill. Once through the Senate floor, the Senate and House versions of the appropriations bill are conferenced, passed again by each body, and finally signed by the President (should be finished by October 1).

Understanding the Governmental Process

Presented by:

CEC Membership Form

(Following Page)

The Council for Exceptional Children

1920 Association Drive
Reston, Virginia 20191-1589
VOICE 1-800-845-6232
TTY 703/264-9446
FAX 703/264-9494

Membership Application

If chapter number is not known, please leave blank. CEC will inform you of your local chapter number. If Student CEC chapter number is not known, please list the full name of your college or university.

1. Address Information

PLEASE PRINT • Use a dark #2 pencil or black ink (ball point or marker)

Chapter #:

FIRST NAME | MIDDLE INITIAL | LAST NAME

☐ HOME ☐ WORK ADDRESS

STREET NUMBER AND NAME OR P.O. BOX AND NUMBER

CITY | STATE OR PROVINCE | U.S. ZIP + 4 / POSTAL CODE

AREA CODE | WORK PHONE | AREA CODE | HOME PHONE | AREA CODE | FAX NUMBER

E-MAIL ADDRESS

CEC may make available, at an appropriate charge, the full or partial list of its members to certain carefully selected companies or organizations serving the fields of general and special education. If you do not want your name included, please check this box: ☐

2. Yes! I Accept

Please check your combined CEC International and State/Province Dues.

MAILING ADDRESS
U.S. States

	Regular	Student*
GA, ME, TX	$75.00 ☐	$33.00 ☐
FL	$75.50 ☐	$32.50 ☐
DE, KS, NV, VT	$76.00 ☐	$32.50 ☐
CT	$76.00 ☐	$33.00 ☐
AZ, MT, NC, PA, RI, UT, WA	$77.00 ☐	$32.50 ☐
MD	$77.00 ☐	$33.00 ☐
CO, IL, NE, OH, OR, SC, VA, WI, WY	$79.00 ☐	$32.50 ☐
AK, NY	$80.00 ☐	$32.50 ☐
CA	$82.00 ☐	$33.00 ☐
MI, MN	$82.00 ☐	$32.50 ☐
Other States and Provinces	$74.00 ☐	$32.50 ☐

***Student Discount Requirement.** To be eligible for student membership, your advisor must complete the following:

I certify that the above named person is a full-time college or university student or a part-time student not engaged in full-time employment as a certified professional in the education profession.

Advisor's Signature _____

University/College _____

Expected Graduation Date _____

Special Paraprofessional, Parent, Retired, and Joint Memberships: Call CEC 1-800-845-6232 for dues information.

3. CEC Gives You More!

Please Check All Divisions You Wish To Join.

Divisions		Regular	Student*
Division for Physical and Health Disabilities•DPHD	A	$12.00 ☐	$ 6.00 ☐
Council of Administrators of Special Education•CASE	B	40.00 ☐	20.00 ☐
Council for Children with Behavioral Disorders•CCBD	C	22.00 ☐	12.00 ☐
Division on Mental Retardation & Developmental Disabilities•MRDD	D	15.00 ☐	6.00 ☐
Division for Children's Communication Development•DCCD	E	15.00 ☐	7.50 ☐
Division for Learning Disabilities•DLD	F	20.00 ☐	13.00 ☐
Division on Visual Impairments•DVI	G	12.00 ☐	5.00 ☐
The Association for the Gifted•TAG	H	20.00 ☐	10.00 ☐
Teacher Education Division•TED	I	20.00 ☐	7.50 ☐
Division for Early Childhood•DEC	J	20.00 ☐	10.00 ☐
Council for Educational Diagnostic Services•CEDS	K	20.00 ☐	12.00 ☐
Technology and Media Division•TAM	L	20.00 ☐	10.00 ☐
Division on Career Development and Transition•DCDT	M	15.00 ☐	7.50 ☐
Division for Research•CEC-DR	N	20.00 ☐	12.50 ☐
CEC Pioneers Division•CEC-PD	P	20.00 ☐	
Division for Culturally and Linguistically Diverse Exceptional Learners•DDEL	Q	15.00 ☐	5.00 ☐
Division of International Special Education & Services•DISES	R	15.00 ☐	7.50 ☐

Only CEC members qualify for membership in CEC Divisions.

4. Compute Total Dues Here

CEC International and State/Province Dues	$
Certificate ($3.00) (Optional*)	$
Dues For Divisions You Wish to Join	$
International Scholarship Contribution	$
Total Dues Payment	$ U.S.

G70696

*An attractive Certificate of Professional Membership is available with your name printed exactly as on this application. To order, enter $3.00 above. Allow up to 6 weeks for delivery.

All dues rates change after June 30, 1997

5. Payment Options

Auth. # _____
Ref. # _____
For CEC Use Only

☐ Check (in U.S. $) ☐ VISA ☐ MasterCard ☐ Discover

Card # | Expiration

Signature _____

Daytime Telephone Number (Area Code)

Please send this form and your payment to:

The Council for Exceptional Children
P.O. Box 79026, Baltimore, MD 21279-0026

Annual membership dues in CEC include $12.00 for subscription to *Exceptional Children* and $15.00 for *TEACHING Exceptional Children*. Annual membership dues in CCBD Division include $6.00 for subscription to *Behavioral Disorders*; annual membership dues in MRDD Division include $5.00 for subscription to *Education and Training in Mental Retardation and Developmental Disabilities*. This information is given in order to meet postal regulations. Please do not use as a basis for payment.

BEST COPY AVAILABLE

Fact Sheet

State Level Legislators

1.) Name of your state senator for the district in which you live. Include mailing address, telephone number, fax number, and e-mail address(es).

2.) Name of your state representative or delegate for the district in which you live. Include mailing address, telephone number, fax number, and e-mail address(es).

3.) Name of the department in your state that is responsible for issuing any education-related policies and/or regulations. Include the name of the head of the department, mailing address, telephone number, fax number, and e-mail address(es).

Module THREE

Changing Public Policy

What does it take to get a legislator's attention? How do I get a lawmaker to listen to me? Why do some people always get heard? Answers to these questions form the basis for this module on influencing policy makers.

As a result of working through activities in this module, participants will:

- Develop a working understanding of how to articulate an issue for lawmakers.
- Learn several tactics for influencing legislators, including writing letters, sending messages over electronic mail, preparing and delivering testimony, accessing and using the media, talking face-to-face, and making telephone calls.
- Appreciate the importance of building ongoing communications with legislators and their staff.

As a result of this module, participants should be armed with the basic tools they need to develop an advocacy strategy. The skills learned in this module, combined with the knowledge in Module 2, will form the foundation for developing coalitions and mobilizing grassroots efforts (covered in Module 4).

Background Information

In the public policy arena, seldom do you have a position that everyone agrees with and wants to support. Moreover, many ideas require funding and, as a result, you may be faced with even more resistance. Obtaining access to your public officials, stating your case, and convincing them that you are right assumes proficiency with three major skills:

- Respecting the advocacy process. This involves understanding and upholding the rules for effective advocacy.
- Knowing how to articulate an issue. This includes stating the issue in jargon-free, practical terms, identifying a need for action, and offering a solution.
- Using influence techniques that enhance your message and ensure that you are being heard.

Interpersonal Rules for Effective Advocacy

Just as it is important to know the objectives of your advocacy efforts, it is important to know—and to control—how you are perceived.

The cardinal rule for every encounter with every community leader, politician, and media gatekeeper is to be pleasant. Regardless of how you may differ on important issues, the personal impression you leave will determine whether or not you will be welcome back. You always want to keep that option open.

Anger is a common reaction to the lack of support involving issues affecting students with exceptionalities and those who educate them. But outward displays of anger are not appropriate in your interaction with policy makers. If you cannot control the anger, cannot channel it into a more positive and productive emotion, you may not be the right person to advocate this particular issue. Belligerence will not only close doors to you, but will typecast your entire organization, and sometimes, even your cause.

Elected officials are used to being accommodated and they expect it. Be willing to show them deference. Even if you do not respect each politician personally, you should respect the office each holds.

Be honest and straightforward. Because information is the commodity you trade, credibility is absolutely essential to your success. Avoid half-truths that have even a chance of being misleading. If you lead politicians down a path where they get ambushed, they will never deal with you again. Remember Mark Twain's advice:

> ***If you tell the truth, you don't have to remember anything.***

Persistence is important in successful advocacy, but beware of crossing the thin line and becoming a pest. Basic courtesy should guide your actions. Be sensitive to the many different demands that are made on political leaders, and plan your advocacy efforts accordingly. Be as timely as possible in contacting them about an issue or in providing the necessary information.

Most of what a good advocate does is intuitive and grows out of a few basic principles. Try to remember these principles when you become discouraged, entangled in detail, or simply confused. They may help clear your head, renew, and redirect your energies. The core set of principles on which most advocates agree follows.

- ***Ask for what you want.*** For a variety of reasons, many of us hesitate to ask for what we really want. There is no place for such hesitation in advocating for issues regarding children with exceptionalities. If you do not ask, you will never get the results you seek. Do not be so pushy that you alienate people, but have the "gumption" to ask for what you need.

- ***Be specific in your request.*** Generalities won't get you what you want. The more specific you can make your request, the better. State the issue clearly, but briefly. Explain the resolution you seek and describe the impact that will occur if the change being requested is not made.

- ***Be ready to work hard.*** There is nothing magical about success in advocacy or success in politics. Victory most often goes to the one who works the hardest. As we will discuss later, coalitions can legitimize your efforts and provide a broad base of support. But there is no substitute for a small team of hardy advocates willing to invest the time and energy necessary to change public policy.

- ***Find a legislative champion.*** One of the first things you must do is find a legislative champion who is willing to take up your cause with his or her colleagues. This special person should be:

  - ideally, in a leadership position or holding a seat on a key committee;
  - if possible, a committee that has responsibility for disability/gifted issues;
  - at a minimum, well-liked by his or her peers;
  - committed to the outcome you seek;

- willing to work your issue;
- not just vote right, but to really work the bill with fellow legislators.

Begin the search for this special person among the personal contacts and acquaintances of CEC members. Is there someone in the legislature who has a family member with a disability, or a background in working with persons with exceptionalities? Is there someone with whom CEC already has a good relationship? Someone who has championed CEC issues in the past? If your search does not turn up the ideal inside advocate, you may have to begin a relationship that will create one. Start with members of the legislative subcommittees that will be key to success, such as the House Subcommittee on Early Childhood, Youth, and Families. Elicit the support of others when following up with a legislator or aide.

- ***Organize, coordinate, orchestrate.*** Plan as much as you can and leave as little as possible to chance. Once the legislative session starts, things can move very quickly, so coordinate carefully with your own troops, the members of your coalition, your legislative champion, and other key members and staff. Work to ensure that all your allies speak with one voice. Reaching a consensus is important. (The time for thrashing out differences is before you approach the legislature.) Remember that elected representatives are most responsive to their own constituents, so always include voting constituents, preferably powerful and politically active ones, on your team.

- ***Touch all the bases.*** Talk with and solicit help from as many groups representing the interests of children with exceptionalities as you can. Approach everyone with a vested interest in your issue. Since you will be advocating on a shoestring, do not waste time or effort trying to hide your plans from groups or individuals you think might oppose your efforts. To the contrary, you may find good allies in unlikely places. At the least, you might be able to neutralize some potential opposition. You will also learn what opposition is out there and be in a better position to deal with their objections.

- ***Be diplomatically assertive.*** Don't be intimidated when legislators make accusatory comments or disagree with you. Remember, they need you and your information as much as you need them.

- ***Stay flexible, be opportunistic.*** Long-range plans can provide good general guidelines for your advocacy efforts, but it is critical that you remain flexible and willing to fight. Remember that campaigns for advocating rights of children and youth with exceptionalities are like electricity: they do not exist without resistance. You must be ready and able to move quickly, to respond to your opponents, and to take advantage of opportunities to advance your cause as they arise.

- ***Keep it simple.*** Policy makers are almost always pressed for time, so it is a serious mistake to waste their time. You should be prepared to state your best case for the issues at hand in 30 seconds. You will have opportunities to discuss the issues in greater depth, but you should always strive to capture your audience's attention within the first few sentences. Always plan your presentations as if your audience will only remember one line from everything that you say. Decide ahead of time what that one line should be (think of it as the headline), and design your message around it. Keep your message simple, appealing, brief, and to the point. Avoid abbreviations, acronyms and special education jargon.

  Any written documents that you leave behind should be concise and to the point (chart and table formats work well). Be sure to supply your name, work and home phone number, e-mail, and fax number. Material that fits onto one page has the best chance of being read. Attach backup and supporting information as appendices (but even the appendices need to be brief, organized, and clear as to what they reference and support). When a legislator or a

staff person wants more information, to be responsive, you must always supply it. Moreover, this gives you the opportunity for another meeting with the legislator. But unsolicited lengthy documents have a very slim chance of ever getting read.

- ***Assume the perspective of others.*** Remember that policy makers hold positions of power. They are used to having a great deal of control over their surroundings and consequently, they often do not easily understand the difficulties children and youth with exceptionalities face. Be patient and understanding in your approach to policy makers. Listen to the questions they ask for clues about their thinking. Remember that once you, too, knew very little about the issues regarding children and youth with exceptionalities. Work to fit what you have learned through personal experience into the framework of persons who have never had those experiences.

- ***Build and preserve your credibility.*** This admonition means more than simply never telling a lie. It means that you should keep your legislative champion and your other allies fully informed, especially about the political climate that surrounds your proposed legislation. You should not mislead allies. Do not promise more than you can deliver. And, do not spring any surprises.

- ***Anticipate and deal with your opposition.*** People who oppose you may approach the issue from a different perspective, and they represent people with different interests. Do not take the differences between you personally, but do not ignore them either. See them as the challenge they are. Plan for opposition to your advocacy efforts and design ways to deal with it. Use the contacts and personal connections you have to neutralize as much opposition as you can. Even where an organization formally opposes your goal, they might be willing to hold their active advocacy against it in check. But do not rely on a promise of passivity, and be prepared to deal with antagonism. Have your own facts and figures ready. Work constantly to portray your bill not as another break for children and youth with exceptionalities, but as a civil rights issue, economic issue, etc.

- ***Be prepared to compromise.*** Because public policy balances competing interests, flexibility is essential. You should be prepared to negotiate, and have a fall-back position. Avoid show-downs. You run the risk of losing your credibility. And, know when to cut your losses.

- ***Never burn your bridges.*** Avoid making enemies in your advocacy efforts. Alliances shift in the public policy arena, and opponents on one issue become allies on another. Deal with your adversaries as you would like them to deal with you. Remember, in advocacy, there are no permanent friends and no permanent enemies.

- ***Target your efforts.*** Trying to persuade every single member of the legislature on your issue would be exhausting and wasteful. Some members will almost always support you, and others will almost always oppose you. Focus your efforts on the key players (the leadership, relevant committee members, and those with recognized expertise on special education issues), and the swing votes (those who begin on the fence but whom advocacy might move to your side). Do not forget your supporters. They need effort, just not as much.

- ***Honor the staff.*** Do not underestimate the importance of staff in a policy-making body. The members for whom they work trust and defer to them; you should, too. Do not necessarily insist on speaking with the legislator personally; it is often more advantageous to speak with the staffers. Because they are free from political demands, including campaigning, staff often develop greater substantive expertise than their bosses. If they want to, they can be a tremendous help. Treat staff well. They also like to be thanked and kept well-informed.

- ***Track your progress.*** Keep flow charts and checklists to monitor your progress. Once the legislative session starts, you will be

racing the clock, so do not let the pace make you lose track of your issue. Avoid making a pest of yourself, but check in with your supporters often to make sure their position does not change. (Your opposition will be checking in with them.) Keep a careful count of the votes you have and the votes you need. Watch the deadlines. Do not force a wavering member into the opponent's camp by trying too hard to pin the person down. Learn how to accurately interpret statements that appear supportive on the surface, but do not constitute a commitment (e.g., "I'd like to be with you on this one," or "I think you have a good case here"). Also, try not to let a legislator commit him/herself to the opposition's position.

- *Be persistent.* Few important social reforms are achieved the first time they are sought, so do not be discouraged by failure. Sometimes sheer persistence is what wins in the end because each time a member turns you down, he/she feels more like he/she owes you in the future.
- *Follow up.* Learn as you go by taking the time after the dust settles to ask questions. Debrief your allies to reinforce your strengths and shore up your weaknesses. Advocacy is an art form learned on the job, so work to get better at it as you go along. If you have worked as a group, members of the group need to share responses, activities, feelings, etc. This information can be used to plan strategies for the next time. Always remember to thank your supporters. It is not only the decent thing to do, but it will make them more willing to help in the future.

Overall, remember that changing social policy is an evolutionary process. Change often comes in small increments. If you do not get all that you seek the first time you ask (and you probably will not), try to ensure that the work you do constructs a base on which you can build your future efforts. Sometimes it is advantageous to have a long-range plan with several short-range alternatives.

Articulating Issues

One of the most important precepts for success in both political and media advocacy is to understand and appreciate your audience. Regardless of how good your intentions are, regardless of how sure you are about the message you want to send, the only thing that really counts is the message that is received. If all your work fails to take into account the background and experience of your audience, and the context in which your message is heard, it could be for naught.

We are all bombarded with information. This is even more true for policy makers. It is literally impossible to pay attention to all the information that surrounds us: we filter and sift this information, and that protects us from becoming overwhelmed. But the filtering process can also prevent important information from getting through. No amount of effort can make a message work if it doesn't get through to people.

Designing your message to get through the audience's mental filters is critical. So, too, is dealing with the information that already exists in the listener's mind. Information is never received in a vacuum. Rather, it enters and resonates (or competes) with an existing body of knowledge and experience. In developing your advocacy message, you should not begin with what it is that you want to say. Rather, you should begin by knowing what is already there. Then frame your message to take advantage of the existing knowledge. Framing means putting your information into a context. For example, if you're advocating for increased special education funding for your state, you might want to relay some "success" stories of students who benefited from a special education program in your legislator's district. When done well, framing makes bare facts come alive. It personalizes abstract ideas and illuminates their relevance and importance.

Everyone holds certain convictions and beliefs that can be evoked by your message. Though we are a very heterogeneous nation, Americans resonate with surprising unanim-

ity to a set of core public values: freedom, security, family, fairness, opportunity, caring. When your message evokes these values, your audiences are not only more receptive to the content of what you say, they actually become involved in it.

Resonating with your audience, or striking a responsive chord with existing values and beliefs, changes your audience from passive recipients of information to active participants in communication. This co-creative process is the highest level of persuasion. It gives your message high impact and leaves your audience feeling involved.

Because of the electronic media, we live in the age of the nine-second media bite. This is not necessarily bad, it is simply a fact of modern life. It suggests that you should design your message to be short and to the point. Work hard to translate what you want to say into simple concepts that can evoke strong emotions. For example, if your goal is to establish a procedure for mediation in your state/province, instead of complaining repeatedly about the current system, concisely state what the positive benefits of such a process could be (e.g., financial, time-saving, beneficial to both schools and parents, etc.). Many people would respond more positively to your constructive ideas than to your complaints.

As applied to politicians, these principles require you to learn as much as you can about their current beliefs and attitudes toward children and youth with exceptionalities.

Influencing Policy Makers

It is not enough to have articulated an issue—an advocate must persuade the legislator or policy maker to listen, agree, and take action. There are a number of strategies advocates can use to influence lawmakers:

- face-to-face visits
- letters and e-mail messages
- telephone conversations
- public testimony
- media coverage
- ongoing communications

Suggestions for using each of these strategies follows.

Visiting with Policy Makers

The rule of thumb when meeting face-to-face with a legislator or staff person is get to know the individual **before** you need to ask for something. Familiarity—particularly when it is positive—can go a long way in facilitating a positive encounter.

There are some basic ground rules to be followed when meeting with a legislator. First and foremost, use good manners. Make an appointment and honor it. Once in the meeting, be polite, be brief and be specific. Offer to answer questions and/or get information for questions that you can not answer. And remember, that rarely do you get a commitment during such visits—unless the official has already publicly made an announcement. Be gracious—thank the person for his or her time upon leaving.

It also helps to do your homework before the meeting. Find out the individual's stance on your issue and their voting record on similar issues. Know which committees and subcommittees the individual serves on.

Some advocates find that it helps to leave a one-page summary of the issue, including recommendations, with the legislator. Include your name and phone number for further follow-up.

There will be times when you will meet the policy maker with a group. Speak with one voice when more than one person meets with the legislator or aide. Pick one spokesperson. Stay focused and don't get off on tangents. It is always a good idea to coach the group ahead of time.

Writing Letters and E-Mail Messages

A personal letter is an effective way to contact legislators or public officials. Legislators and public officials are very attentive to the views of their constituents. They keep track of the number of letters received on any given issue.

It is important to write letters at the right times—when laws are being drafted, when hearings are being held, and when a vote is pending in committee or on the floor. Keep track of where the bill is in the process, so that you can draft the content of your letter appropriately.

You should first write to your own representative or senator. Next, write to the chairperson of the relevant committee or subcommittee and to the sponsors or cosponsors of the bill. Finally, write to the House and Senate leadership.

In general, there are four major parts to a letter:

- The address and salutation. Address your letter properly. Include your return address. (See *Figure 7* for sample salutations.)
- The introductory paragraph. This paragraph should include the reason for the letter, a brief description of who you are, and what action you are seeking. Identify the bill you refer to not only with a number, but also with a brief description. Let the individual know if you are a constituent. If you voted for him or her, make that statement up front as well. Identify the group you are associated with (e.g., CEC).
- The body of the letter. These paragraphs communicate the reason for the action you are seeking. Be as brief as possible. Get right to the point and state what you want and why. Make your letter personal. Here you might present data, credible opinions, the impact of data, viable alternatives, personal experience, brief anecdotes, logic, and/or weaknesses of the opposing views. It is also helpful to include the impact the action will have on the community.
- Letter closing. Restate the action being sought, express appreciation for consideration of views, indicate your willingness to help, and ask for a response.

Tips on writing letters to legislators and public officials are presented in *Figure 8*. (Note: To enhance advocacy efforts, we strongly urge you to send copies of any letters and responses received to the Department of Public Policy at CEC Headquarters and to your CAN Coordinator.)

Remember to write a letter of appreciation when you feel your legislator has done a good job, or when he/she has been particularly responsive to concerns you have expressed. If your legislator votes your way, be sure to send him or her a thank you letter. Send a bill's sponsors thank you letters for their efforts, win or lose.

Letters to the Editor. Letters to the editor in your local newspaper can be an effective way to communicate with legislators because most read their local newspapers regularly. Begin your letter with a short paragraph about your issue, followed by several paragraphs (not more than three short ones) that state your views about how and why the issue would benefit your community. End the letter by asking your legislator to take the lead in working out a legislative solution. If you can give your letter a local slant, do so.

Some advocates use the "letter to the editor" as a strategy for publicly thanking an official who has shown interest and positive action on behalf of children with exceptionalities.

Remember that most newspapers will not publish letters without names. Make sure to include your name, address, and phone number for verification purposes.

Communicating Quickly. There are times when speed of response, by those in the states, to legislators in Washington, DC is important. When this situation occurs, the telegram may be the best device to use to get the message to the Congress as quickly as possible. Contact Western Union and inquire about their special rates for public reaction to legislative activities.

In addition to the telegram, other options at reduced rates include:

- Personal Opinion Message: Consists of up to 15 words, can be sent to any public official (you are not charged for names or addresses) and delivery occurs the same day the message is sent.

Figure 7: Suggested Addresses and Salutations for Legislators or Public Officials

U.S. Senator

The Honorable (full name)
U.S. Senate
Washington, DC 20510

Dear Senator (last name):

U.S. Representative

The Honorable (full name)
U.S. House of Representatives
Washington, DC 20515

Dear Representative (last name):

Aide to a U.S. Senator or Representative

Name (not title)
c/o The Honorable (full name of Senator or Representative)
(address)

Dear Name (not title),

Governor

The Honorable (full name)
Governor
State Capital
City, State, Zip

Dear Governor (full name):

State Senator

The Honorable (full name)
State Senator
State Capital
City, State, Zip

Dear Senator (last name):

State Representative

The Honorable (full name)
State Representative
State Capital
City, State, Zip

Dear Representative (last name):

Figure 8: Tips On Writing to Legislators and Public Officials

- Do not use form letters. Don't send a mimeographed, carbon or any other non-original copy.
- If you or your group have stationary, use it.
- A typed letter is not always preferable. However, make sure your letter is legible. Neatness counts!
- Use a complete return address on the envelope and in the letter.
- Keep letters short and concise.
- Identify your subject clearly in the first paragraph: include the bill number(s) and legislation.
- Use titles, if appropriate (e.g., Dear Senator ____). Make sure that you have spelled the individual's name correctly. And, never send a copy of a letter addressed to a representative to a senator—or vice versa.
- Give reasons for your position. If you have specialized knowledge, share it with your legislator.
- Be constructive, not negative. Admit that problems exist and suggest practical alternatives.
- Never threaten to vote against or try to bribe the legislator with your vote.
- If you want the legislator to read your letter, do not criticize or be abusive.
- Request a reply from your legislator outlining his/her views and intended action.
- Keep letters to one subject/issue to avoid confusion.
- Be reasonable. Do not ask for the impossible.
- Do not assume that your legislator knows as much as you do on a particular subject.
- Write your letter when the bill is in committee or subcommittee or when you receive a call for action from CEC Headquarters, your Federation/Division office, or your CAN Coordinator.
- Avoid stereotyped phrases and sentences that give the appearance of a form letter.
- Letters from personal friends of the legislator often receive priority. Use board members and other contacts effectively.
- Sign your letter over your typed name, if appropriate.

- Mailgram: Contains up to 100 words, can be sent to anyone. Delivery is by the U.S. Postal Service and arrives the day after the message is sent.
- Night Letter: Night letters of up to 100 words are sent at night and arrive the next day at a reduced rate.
- FAX: Most legislators have public FAX numbers. Send your message via FAX in either a letter or telegram format.
- Electronic Mail: Most legislators now have access to the Internet. Send them messages over the electronic highway! Contact CEC for an up-to-date listing of all representatives and senators who have an e-mail address.

- Mass Letter Writing: If time permits, send a personalized letter from as many constituents in the field as possible to the legislator.

Making Telephone Calls

If timeliness is critical, don't write—telephone. Do not expect to be put through to your legislator when you call. They cannot talk to every constituent. The staff is there for the purpose of listening to constituents and reporting to the legislator.

Ask to speak to the legislative assistant (L.A.) who handles education issues. State your interest clearly and briefly to the receptionist and you will be put through to the appropriate staff person.

At the outset, restate your name, town, and the agency or organization that you represent (e.g., CEC, division, federation, chapter, etc.). Outline your concerns in a brief, yet orderly manner. State your reasons for support or opposition to the issue. Ask clear and precise questions.

Do not keep the person on the phone for more than five or ten minutes. If you have additional material to send, tell the staff when it will be sent. Always try to follow up your phone call with a letter. Remember to request a follow-up from the office with the legislator's position on the bill.

In addition to his or her office on Capitol Hill, every legislator has a district office located in your state. If you're concerned about making a lot of long-distance phone calls, it's just as effective to contact your legislator's district office.

To find out the telephone numbers of your Senators and Representative, call the Capitol Switchboard at (202) 224-3121, or the Council of State Governments at (202) 624-5460. Telephone numbers for elected officials in your state should be listed in your phone book.

Preparing for Legislative Hearings

You should work hard to get legislative hearings scheduled for your bill as it winds its way through the committee structure. Hearings are sometimes even held on issues for which there is no pending legislation, though this is less common.

Hearings function to create a public record. They are almost always tightly controlled and well orchestrated: seldom are any surprises sprung at a hearing. Nevertheless, they are often attended by the press, and they present an excellent opportunity to advocate your position, both directly to the key policy makers and indirectly through the media.

Hearings also serve as an important rallying point and reinforcement for your hard working supporters. A legislator who supports your cause must arrange the hearing. Working with him or her, you should plan the hearing to demonstrate as broad a base to your support as you can muster. Draw on your students with exceptionalities advocacy network and coalition, and your broader CEC contacts. Look to your local or state universities for experts in special education who might lay out the issue from a medical, research, or scientific point of view. If you cannot get these key individuals to testify, see if they will submit short written statements for the record in support of your bill, or at least letters of support.

If you have never been to a hearing, try to attend one being held before the same committee holding yours. Work hard to prepare your supporting witnesses for their testimony. Help them frame their message in terms most supportive of your position. Unless they are seasoned veterans of legislative hearings, rehearse their testimony with them, and practice a question and answer dialogue like the one in which they might become engaged with members of the committee. Keep in mind that it is sometimes difficult for academics to avoid technical language.

Help your witnesses understand that committee members may have very little knowledge of special education and might be put off by jargon. Witnesses must also show deference and never speak down to elected of-

ficials. Witnesses should use clear, direct, and simple language that, if picked up directly by the press, could convey their message to a broad general audience.

At the hearing, witnesses will probably be asked to limit their oral testimony to five to seven minutes. This is a request you must honor. Your written testimony, which should be prepared in multiple copies for distribution to members of the committee and the press, can be longer than what was presented verbally and can include much of the background and supporting information that you will not have a chance to present orally.

For highest impact, your oral statement should not be simply a reading of your written statement. In fact, your oral statement should not be read at all, but delivered from the heart, directly to the committee members as if they were guests in your home. You want the committee members to get to know you and your CEC organization during this hearing. Speak from experience in the same way you would in a conversation with a friend. You want these members to fully understand issues related to children and youth with exceptionalities and to feel eager to correct the current wrongs.

The only exceptions to time limitations on oral statements are if members of the committee ask you questions and engage you in a dialogue. This is exactly what you want to happen. It might reveal misunderstandings they have and give you the opportunity to correct them. It can increase the members' involvement with, and hence commitment to, your issue. And it will build a longer record.

Remember, if these members like you, your organization, and your coalition, they will want to work more with you in the future. Do not feel compelled to answer any question that you do not think is proper or on point. If an irrelevant question is asked, try to steer the conversation back on course with a polite rephrasing in order to address the issue at hand. Also, never be embarrassed if you are asked a question to which you do not know the answer. Rather, offer to get the information the questioner seeks and submit it for the record. Then be sure to follow through.

Begin with your main point and stay with it. If opponents of your bill have testified before you, use your testimony to rebut their most damaging points. If they will not testify until later, anticipate and deal with their opposition.

Testifying Before a Legislative Body. From time to time, you may be called upon to testify and/or write testimony. The purpose of testifying before a congressional committee, subcommittee, or state legislative committee is to present the views of CEC, its divisions, and other units to the elected officials concerned with new legislation or in developing amendments to current laws.

Testimony may also be given at state or federal advisory committees. Before preparing testimony, it is important to consult with others involved in the topic under consideration, as well as be familiar with existing position papers and reference material. Whenever you testify before a legislative body, always address the chair of the committee first, and then the committee members themselves (e.g., "Madam Chairperson, members of the _____ committee."). This applies each and every time you respond to a question from the panel, whether or not the chairman asks it himself.

Identifying Testifiers. Because the need to testify may come up with limited advance notice (sometimes as little as seven days), it is important to have a list of persons who would be willing and able to prepare and give testimony. In some cases, the testimony may be written by one individual or committee/group but presented by someone else.

Preparing Your Testimony. The following tips should be reviewed for usage when preparing and testifying before legislative or advisory committees.

1. Identify yourself, and, if applicable, the organization you represent.

2. State your position for or against the proposed bill or action.

3. Summarize your recommendations first

and then add explanation. Include answers to the following questions.

- What is your special interest? If testifying as an individual, explain why the proposed bill or administrative rules or action by a governing body would affect the students you serve. If representing a group, explain the group's interest and how you know other members of the group share the opinions expressed in your testimony.
- How did you arrive at your conclusions?
- Who will benefit or who will be hurt?

4. Include the following information:

- Outline of the problem(s) as you see them.
- Solutions you think would be acceptable and alternatives to proposed solutions with which you do not agree.
- Mention the positive aspects of the issue.
- Use statistics, charts, and graphs when relevant.
- In general, testimony should be brief (around five to seven minutes), stimulating, and overstated in order to excite and energize the legislators about needed programs or changes.
- Avoid attacking other groups, organizations, individuals, or other educational agendas. This could backfire and have the reverse effect and lower your credibility.

5. Sum up your position at the end.

6. Have enough copies of your testimony available to give to each legislator and to the press.

7. Avoid: cliches, excessive wordiness, vague generalities, flattery.

8. Be clear, concise, and brief. Include examples if relevant. If pertinent, explain how present laws or procedures would be negatively affected by proposed bill or procedures.

9. By all means, use plain English and stay away from jargon used in our field. If you must use a word or phrase that is uncommon, be sure to explain it.

To help understand the art of testimony, it is suggested that you attend at least one hearing at any level of government and review the written testimony given by others. This should better prepare you for the time when you will be called upon.

Accessing the Media

Media advocacy is the strategic use of mass media as a resource for advancing social or public policy change. Like advocacy in general, media advocacy is an art. Most of what the great masters of media advocacy have learned, they discovered through experience.

Always remember that media is a means to an end, never an end in itself. The media can sometimes function like a mind-altering drug; the quest for coverage can overpower the well-meaning advocate and cause him or her to lose sight of his/her immediate and long-term goals.

Remember that bad coverage can do more harm than no coverage at all. Do not get caught up in the power of the media. It is only one of the many weapons you will use in the battle for reform. The emphasis is on using it, not letting it use you.

Make Sure It's Newsworthy. Media gatekeepers are much like policy makers. Both have limited time and attention, so both must be lobbied effectively to get what you want from them. Don't ever wait to be contacted by members of the media. When you want them to cover a story, take an activist approach.

Media is a limited resource. Access is reserved for those stories which media managers deem to be newsworthy—e.g., significant, interesting, and new. Therefore, advocates must look constantly for new ways to push their issue. These opportunities for access are called news "pegs," "angles," or "hooks."

Factors that get people to pay attention to a news story are the traditional criteria for news:

- ***Timeliness***. News, by definition, is recent.
- ***Proximity***. The event is within the audience's perception of their community boundaries.
- ***Consequence***. The news will affect the viewer/reader.
- ***Human interest***. There is an appeal to emotion or an illustration of a universal truth.
- ***Conflict***. This could be a clash of opposing interests.
- ***Prominence***. The news is affiliated with a celebrity or renowned figure.
- ***Unusualness***. The news is about something that has not happened before.
- ***Inoffensiveness***. The media not only does not want to offend anyone, it wants to avoid public complaint. This gives vocal, mobilized segments of the public a disproportional amount of influence with the media.
- ***Congruence***. If the information is too unusual, if it does not fit society's existing theoretical constructs, it will not sell.
- ***Brevity***. Whether broadcast or printed, information has to be packaged into short bites to compete with the clutter of other bits of information.

As with politicians, the easier you can make a reporter's job (e.g., the more work you can do for him/her), the better. This is especially true when it comes to framing your issues. Work hard to put the bare facts of your story into the framework or perspective in which you want them viewed.

Forming Positive Media Relations. You should form personal relationships with state/local reporters that will be mutually beneficial. You need them, but they also need you.

It is best to contact members of the media when you do not want something specific from them. (For example, you could arrange a meeting with the editorial board of your local newspaper before your issue gets hot.) Take the time to introduce yourself, your organization, and your cause. Let them know that you are an expert on your issues and become a continuing resource for them. Build the mutual trust and respect that are essential to all successful relationships.

Always remember that reporters' interests will not always converge with yours. They are after stories, not social goals. Therefore, if the goal can be related to a specific local program or issue, the "story" line can evolve while still delivering the message about the issue. It is your responsibility to package the information that you give them in a way that serves both your and their needs.

Don't count on anything you say being truly "off the record." If you never want to see it in print, don't say it. As in political advocacy, a good rule of thumb in media advocacy is that there are no permanent friends and no permanent enemies.

Keep track of the reporters on your "beat." Meet with editorial boards of newspapers. Learn all you can about who makes the decisions in each media outlet and how. Newspapers have reporters, but they also have section editors, city editors, national editors, feature editors, managing editors, and publishers. Broadcast personnel include assignment managers, planning editors, and executive producers. The key people in each outlet are worth meeting in person.

Never, never lie or mislead a reporter. Information is the commodity you are marketing, but credibility is what you must use to sell it. Exaggeration is not necessary when it comes to issues regarding children and youth with exceptionalities.

Develop a local targeted media network—start with a goal of a dozen names, targeting your main audiences. In addition, coordinate your efforts with your president and CAN Coordinator if possible. Build your media network so that it includes the following:

- The Council for Exceptional Children (for

TEACHING Exceptional Children, *CEC Today*, and so that Headquarters can disseminate it nationally to CEC units, and national press/stakeholders)

- Local news media
- Local education/disability associations
- Local and state education agency vehicles, both special and general education publications

Using Media Strategies. A media strategy is a plan for using the media to accomplish a specific goal. To be successful, a media strategy must be carefully thought out and tailored to accomplish its goal. In particular, the strategist must know:

- The goal in precise and realistic terms
- The message in clear, simple terms
- The target audience
- The best outlets to disseminate the message and reach the target audience
- What the audience should do after they have heard the message
- What, if any, assistance will be needed to accomplish the goal

As in all successful advocacy interventions, a good media strategy requires you to stick to a single central theme. Make your total message revolve around it. Keep the theme simple and appealing.

It's important that you involve CEC leadership in determining your media strategy, making sure to include your federation/division (or chapter) president, your membership/program chair, and your CAN Coordinator or government relations liaison. Together, you should decide what issues your unit will focus on, and what your message(s) will be.

To be successful at media advocacy, you must remain flexible and responsive. Seize whatever opportunities present themselves to push your issues. In this sense, a media advocacy campaign is like a political campaign in which candidates react constantly to unexpected events and late-breaking news.

You can piggyback local coverage on national events, such as National Disability Week, CEC's Exceptional Children's Week, CEC's national convention held every year in April, or your federation/division/local conference. Always try to give your story a local spin.

You will find more avenues to access the media by thinking of different ways to package your information. Hard news is what is reported on the front page of the newspaper and on the 6 P.M. news.

Coverage of hard news is very limited, because hard news stories are tersely written. However, alternatives to hard news coverage are called soft news. They include feature stories, human interest stories, individual profiles, and what is in the Style section of the newspaper.

Do not hesitate to call a reporter if you think you have a good story. Remember that they are paid to gather news from informants like yourself.

Following are some ways of accessing the media on paper:

- Issue a written calendar or event advisory far in advance of the event. This can be faxed or even hand-delivered.
- Issue a press release. This is best for print media, with lots of lead time and limited in-house reporting resources. It should be written so it could be reprinted directly or with few changes. Tips for writing a news release are in *Figure 9*.
- Mail or fax a "tickler," which is a one-page, informal presentation of ideas or angles on stories that do not have particular deadlines. The tickler should be accompanied by substantial background information.
- A pitch letter is sent to a specific journalist who will be interested in the story. This letter, which often sells the story, should be personalized; this is a great way to build a relationship with a reporter.

When you make initial contact by mail, follow up with phone calls. Ask the reporter if he or she is on a deadline (they almost always are!). If so, ask when it would be con-

Figure 9: Preparing News Releases

- At the top, put the name of your organization and its address, and the name and phone number of the contact person.
- Leave at least two inches of white space before starting the release body.
- Type, double-spaced, on one side only.
- If the release runs more than one page, write [more] at the bottom of the page and begin the next page with a one-word identifier.
- Write "end" or use the "#" at the end of the release.

venient for you to call back. If they are not on deadline, ask if you can have 30 seconds of their time. Keep good records of your contacts with the press and their responses. You may want to contact them again.

Remember local radio talk show hosts and local cable stations. They have commitments to their own communities and a lot of time to fill each day.

Be proactive and assertive in accessing the media. Other ways to do so include:

- *News Briefings:* Use an informal news briefing when you have sufficient lead time (e.g., 30 days) before a news event, when the issue is complex, and when reporters would benefit from advance notice and good background information. Briefings can be held with individual reporters or small groups.
- *News Conference:* Hold a news conference only if you have hard news and cannot handle the story in any other way (e.g., through a simple press release). The fanciest trappings of a news conference cannot create or add to the substance of any story. The worst result is an event that no one attends, or one from which no one takes a story. Make sure you had a valid reason to hold a news conference; for example, hold one in conjunction with your local or state CEC conference, your overall advocacy efforts, or your celebration in honor of CEC's Exceptional Children's Week.
- *Feature a Good Speaker:* The spokesperson should deliver a statement, but must also be prepared to engage in open dialogue with the press.
- *Press Kits:* Include background information, biographies, and other useful materials. Press kits may also include general CEC information/overview; leadership information; division/state/provincial/federation/chapter information; press clips; calendar of events; current and future programs; newsletters/journals; and information about unmet needs (e.g., importance of resources to the education of our students, special education fact sheets).

For more information and guidance about accessing the media, get a copy of CEC's ***Public Relations Survival Guide***. To order your copy, call the Department of Public Relations at CEC Headquarters, (703) 264-9478.

Responding to Requests by the Media. Whether you're being interviewed by a reporter over the phone, or you get scheduled to appear on a local radio or television show, follow the same approach as in giving testimony in a hearing.

Before each show and each interview (live or recorded), find out as much about the for-

mat as you can, especially how much time you will have. Learn as much as you can about the audience, too. If you have the opportunity, assist the reporter in developing the questions you will be asked. Provide background information, including facts and figures that might be useful to the reporter (and to your own cause).

Keep language simple and direct. Don't use jargon. Jargon puts people off. Speak in short, clear, punchy (e.g., quotable) sentences.

Pre-taped interviews will be edited, so points that are made in long, rambling paragraphs will be lost. Remember that much of what you say will be reduced to 15-second sound bites.

Make your most important point first. If you try leading up to it with background information, you may not get it in at all, or you may lose your audience in the meantime.

Be prepared with short, well-phrased explanations of your main points, but be attentive throughout the interview so you can respond to what is being said.

Emphasize your major points by "flagging" or listing them (example: "The most important thing to remember is..." "The three crucial conclusions are...").

Maintain control throughout the interview. Do not feel compelled to answer a question if you don't like it. Rather, use it as an opportunity to get your point across. Be ready to "re-frame" questions that are off the mark.

Prepare three memorized objectives, or sound bites, that you can always refer to if the interview strays a bit. You can "bridge back" to these points if a reporter tries to get you to say something that is contrary to CEC's objectives. For example, if the reporter says that another special education agency offered a different perspective on an issue, and asks you to comment, instead of out-and-out refuting that organization's opinion, say "Well, that may be their point of view. But CEC feels that..."

Don't try to be a know-it-all. If you don't have the answer to a particular question, don't fake it. Instead, use the opportunity to make one of your main points, or, if time allows, offer to find the information the reporter wants.

Be patient, not belligerent; kind, not nasty; helpful, not argumentative. Let your expertise come across, but do not be haughty. Calmly "bridge" to your three sound bites. The audience will not retain the facts and figures you present, but they will remember how they feel about you.

Continuing Communications

Strive to develop a continuing communicative relationship with your legislator and his/her staff. This will counteract the legislator's possible impression that he or she hears from you only when you want something. Consider supplying information about disability and/or gifted issues throughout the year. If your information is consistently useful and dependable, the legislator will be encouraged to rely on it.

Other Methods of Getting to Know Your Legislators. The people who serve in our legislatures are usually reasonable people who will respond favorably to a logical and reasonable approach.

Legislators are influenced not only by rational argument, but also by pragmatic concerns of politics (e.g., votes, party loyalties, etc.). In addition to the methods described in the earlier sections of this module such as letters, telegrams, and phone calls, the following methods should also help in influencing legislation favorable to children and youth with exceptionalities and special education, in general.

- ***Attendance at hearings.*** Even if you are not testifying, attendance at relevant hearings will have an effective influence on legislative votes. The mere physical presence of impressive members of CEC could have critical impact on the outcome of getting important legislation passed.
- ***Political receptions.*** Meetings of this type at all levels of government are invaluable in getting to know legislators as well as their staff aides. When appropriate you

may want to give an award (usually a plaque) to a legislator or a staff member for his or her efforts on behalf of special education and the disability community. Be sure to take pictures of the legislators and publish these in newsletters, journals, etc. A copy of these should be sent to the individual. In addition, a good turnout of CEC members for a dinner or reception demonstrates a show of strength and a high level of interest in special education.

- ***Political dinners.*** Dinners may be handled in a variety of ways: you might have one legislator as the main speaker or you may have several officials where a particular bill or special education issue can be discussed. You might also consider general special education issues at such a meeting. In any event, a banquet, dinner, and so forth, is an excellent opportunity to interact on a one-to-one basis with legislators in a pleasant environment, removed from the formal atmosphere of the U.S. Capitol or state capitals.
- ***Attendance at political fund-raisers.*** Politicians rely on their supporters to raise money for their reelection. These breakfasts, receptions or events can provide you with a way to get to know your legislator in an informal setting.
- ***Speaking engagements by legislators.*** Invitations to speak to groups of constituents are usually welcomed by legislators, since such visits provide high visibility necessary in political life. Both the legislator and the constituents get a chance to exchange views. This type of event allows CEC members to express needs and their positions on specific legislation. It also gives visibility to the CEC unit. Once again, good preparation for any meeting with an elected official or officials is essential. CEC members should clearly know their agenda. If a legislator should ask for information that is not available at the dinner, be sure to follow-up within a few days with the requested materials. The response should reference the event (e.g., banquet, dinner, etc.).
- ***Setting up site visits.*** Nothing can provide a positive message to legislators better than children themselves! Set up a time for your legislator to visit your school or program, and allow him or her to see how effective special education can really be for students with exceptionalities.

Finally, have patience! Advocacy is usually a deliberate, painstaking process.

Stages in Influencing the Policy Process

There are various steps in the policy process—from formulation through implementation—during which you can have a tremendous effect. In order to successfully build your case during any of the steps (e.g., to influence the process), keep the following in mind.

- ***Involve the policy maker in your efforts to effect change.*** The goal is for the official to feel "ownership" towards the issue.
- ***Make sure your reasons for change are sound.*** Often, policy makers attempt to enlist support from other policy makers or from their constituents. They need descriptions of individual cases from you that have persuasive potential. But, while such case studies are useful in illustrating a point, policy makers are typically most interested in findings that are based on representative samples and that can be appropriately generalized to the population of interest.
- ***The information you provide should be timely and appropriate based on the current stage of policy development.*** The stages—policy enactment, policy implementation, and policy oversight—are fairly consistent across federal, state, or local levels.
- ***Present your information in the most effective way possible.*** You need to understand the policy maker and then tailor your "presentation" in a way that will increase the chances of him/her accepting your suggestion and incorporating it into current

school policy. Present your point of view in a clear and concise manner, with details to back you up. Present only information that clearly pertains to the policy issue. Present your information in a variety of ways, in order to accommodate various learning styles (e.g., through letters, charts, graphs, or speaking directly with the policy maker). And finally, since often more than one policy maker is involved in deciding whether a particular policy should be implemented, focus some of your efforts on the policy maker's colleagues, especially those he or she respects or is influenced by.

How do these principles look in practice? Let's consider an example.

> You are collaborating with a regular education teacher in an inclusive classroom and you need more planning time. If you'd like to change your school's policy to ensure that there's a specified amount of time each week for joint planning, problem-solving, and other collaborative activities, the first step is to involve your principal from the beginning; ask his or her guidance on how to establish a new policy. Or, if the policy change requires an amendment in your state's special education law, contact your state legislator and describe what you feel is the problem to him or her. That way, as the new policy is being developed, any adjustment in the policy's design and procedures can be accomplished with both the knowledge and support of the policy maker.
>
> You will want to show that it is advantageous to have specified time each week to collaborate and plan classroom activities. Provide your principal with specific examples of benefits that result from this type of collaboration.
>
> You might also want to add a condition to the policy which specifies that teachers' pay will not be reduced by the corresponding amount of time spent on collaboration. This would also be an appropriate time to bring in published data and information to support your concerns (e.g., in this example, you might provide a copy of CEC's ***Creating Schools for All Our Students: What 12 Schools Have to Say to the Policy Maker).***
>
> It is also helpful to draw attention to other schools, particularly in your district or nearby, that have tried to have an established "collaboration" time built into their school week. If their efforts were unproductive, refer to the past experiences and suggest changes that will make the program in your school more successful.

All in all, influencing policy is a long term commitment. While change does not happen overnight, there is a reasonable progression that allows you to measure and predict major milestones.

Further Reading

There are many basic communication skills underlying advocacy work. Typical examples include negotiation, listening, problem solving, risk taking, team building, presentation skills, and using persuasion techniques. **Lynn Ziraldo**, a CEC member who has been active in CAN and who has conducted advocacy training, recommends resources such as ***The Fifty Minute Series*** from Crisp Publications (95 First Street, Los Altos, CA 94022; 415-949-4888). Other training programs, such as those published by human resource groups, can also offer valuable suggestions for addressing these basic skills.

Policy Change Workshop

This section provides you with ideas for helping advocates develop strategies for influencing public policy. Specifically, the ob-

jectives of the session or workshop are skill-based. They are as follows:

- To assist participants in articulating issues.
- To learn strategies for influencing policy makers.

There are several influence strategies featured in this module. From a practical perspective, you most likely would not choose to cover **all** of them in **one** workshop—unless, of course, you had several hours or even an entire day to spend with your group. We suggest that you select one or two strategies for presentation that are most applicable to your group, and save the others for another time, preferably when your participants will have the chance to use them immediately.

Most trainers will find that topics can be covered best in 90-minute intervals. However, realizing possible time constraints, the session is organized as a one-hour presentation, which can be expanded if time permits. The activities that follow are organized according to the following topics:

- Following good advocacy protocol
- Articulating an issue (Note: should be a prerequisite for influence strategy content)
- Influence strategy: Face-to-face visits
- Influence strategy: Letters and/or electronic mail messages
- Influence strategy: Telephone calls
- Influence strategy: Testimonies at public hearings
- Influence strategy: Media
- Influence strategy: Ongoing communication

Figure 10 presents a sample agenda.

Following Protocol

Advocacy is an interpersonal endeavor. The success of your efforts will depend largely on how well you communicate interpersonally with others. Policy makers, aides, and even news reporters will all expect a certain degree of decorum in their interactions with you.

In this section of the agenda, you should guide participants in understanding the interpersonal rules for advocacy work and how to influence the policy process. The blackline masters in *Appendices 3A and 3B* can be used to as an overhead and/or as a handout to guide discussion.

Warm-Up Activity: Rules for Advocacy Work

In this activity, participants review the interpersonal rules for advocacy (*Appendix 3A*) and recall instances in which those rules or behaviors were significant.

Materials: Copy of *Appendix 3B* for each participant.

Procedures: Ask participants to think of an experience in which they served as an advocate. (Or, if they have not had this experience, recall one in which they observed an advocate.) Ask them to consider what made it a good encounter, and/or what made it a bad one. Use the list of interpersonal rules as a guide.

Debrief the activity by having participants share experiences. Have them comment on the significance of any particular rules. If a particular rule consistently shows up in discussion, comment on it.

This activity moves well into a discussion of advocacy protocol and role of good manners in building relationships.

Warm-Up Activity: What Went Wrong?

In this activity, participants think back to a bad experience with advocacy. They identify what went wrong on an interpersonal level.

Materials: Make an overhead from the blackline master in *Appendix 3B*.

Procedures: Ask participants to recall an unpleasant advocacy experience. Have them

Figure 10. Agenda

Time	Activity	Purpose	Process
5 minutes	Welcome & Introductions	Set positive tone; clarify expectations	Facilitator welcomes participants; introduces self; provides overall goal of the session.
15 minutes	Participant Introductions and Warm-Up Activity	Set positive and interactive tone; activate prior knowledge.	Participants introduce themselves and participate in warm-up; facilitator links activity to content to be presented.
20 minutes	Content Presentation with questions and answers: - Rules for Advocacy - Tips for articulating an issue	To transfer knowledge to participants; provide context for influencing policy makers; give participants opportunity to ask questions.	Facilitator shares information, either in mini-lecture or informal presentation; encourages participants to apply principles to their own work; invites participants to learn a specific, influence technique.
45 minutes	Application--How to:* (pick one): - Write letter - Give testimony - Make telephone calls - Meet face-to-face - Use media	To assist participants in applying their knowledge; encourage participants to want to develop a new skill.	Facilitator orients participants to the technique; presents information on the techniques; engages participants in analyzing examples and formulating their own version.
5 minutes	Closure	"Wrap-up" session & provide opportunity for feedback.	Facilitator thanks participants; encourages feedback; gets a sense of those participants who want to participate further.

*note: Each technique requires between 30 and 45 minutes of practice & instruction.

identify what went wrong on an interpersonal level.

As they describe their experiences, check off which rules might have been broken on the overhead. Move into a discussion or presentation of the rules for good advocacy.

Warm-Up Activity: Self Assessment

In this activity, participants rate themselves on how well they demonstrate the rules for positive advocacy interactions. If you are working with a veteran group of advocates, this activity provides them with a means of self assessment.

Materials: Copy of *Appendix 3B* for each participant.

Procedures: Ask participants to rate themselves using a 5 point scale on each item. The scale might look like the following:

- 5 points - This describes me all of the time.
- 4 points - This describes me most of the time.
- 3 points - This describes me sometimes.
- 2 points - This describes me rarely.
- 1 point - This never describes me.

After participants have finished their assessment, ask them to put a star next to those items that they have mastered. Have them circle the items that they need to work on. Share and compare results.

As you move into your presentation, ask participants to share what makes it particularly easy or difficult to practice each rule. Ask them what it would take to improve their performance on selected items.

Warm-Up Activity: The Cardinal Rule

In this activity, participants share their beliefs about interacting with policy makers. They will complete a brain dump—that is, they will share ideas until they have exhausted all possibilities.

Materials: Make an overhead of the blackline master in *Appendix 3C*. Index cards (optional).

Procedure: Show participants the overhead in *Appendix 3C* which states: "The Cardinal Rule for Every Encounter with Every Community Leader, Politician, and Media Gatekeeper is to BE PLEASANT!" Ask participants to think of other rules. Invite participants to share their rules until they have exhausted all possibilities.

One variation of this activity is to have participants write a politically correct rule on the front of an index card. On the flip side, have them write what might be considered a politically incorrect rule. Keep these anonymous. Collect them and pass them throughout the room.

Another variation asks participants to write a rule on the front of an index card. On the flip side, write something that makes it difficult to follow the rule (or easy to break the rule). As people pass their cards throughout the room, other participants are encouraged to add to the flip side.

Debrief the activity by sharing participants' reactions. Move into a discussion of rules of interacting in advocacy encounters.

Articulating an Issue

All advocacy concerns lobbying for or against an issue. How you articulate an issue will either further or hinder your cause. In fact, many times people do not agree with your position simply because they do not know what it is. Or they might have interpreted you to mean something different than what you intended.

In this section of the agenda, you should guide participants in articulating an issue. The blackline master in *Appendix 3D* can be used to guide your presentation concerning tips for articulating an issue.

Warm-Up Activity: What Is This Person Really Saying?

In this activity, participants share what they already know about articulating an issue when they critique someone else's message.

Materials: Make copies of the blackline master in *Appendix 3E*.

Procedures: Share the message in *Appendix 3E* with the group. Ask the group to assume the role of coach for the person by identifying all of the places in which communication could be improved.

As participants debrief, write their answers on an overhead. Or use the overhead in *Appendix 3D* as a guide for checking off responses.

Follow the discussion with a brief presentation on articulating an issue. If time permits, follow-up the presentation by having participants rewrite the letter. Have them exchange letters and critique each others' work according to the tips in *Appendix 3D*.

Warm-Up Activity: How Do You Improve This Message?

In this activity, participants share what they already know about articulating an issue when they critique someone else's message.

Materials: Make copies or overheads of the blackline master in *Appendices 3D, 3F*, and *3G*.

Procedures: Share the message in *Appendices 3F* and *3G* with the group. Ask them to assume the role of coach for the person by identifying all of the places in which communication could be improved.

As participants debrief, write their answers on an overhead. Or use the overhead in *Appendix 3D* as a guide for checking off responses.

Follow the discussion with a brief presentation on articulating an issue. If time permits, follow-up the presentation by having participants rewrite the message. Have them exchange messages and critique each others' work according to the tips in *Appendix 3D*.

Warm-Up Activity: "I Would Convince You By Saying..."

In this activity, participants are challenged to think of approaches they might use to convince others of their point of view.

Materials: A set of 12 index cards for each group. Timers (optional).

Procedures: Pass out the index cards and ask the group to write down as many issues related to special education advocacy work as they can think of. Do not share these with anyone. (Or, you can write out different issues prior to the activity—for example, class size in inclusive classrooms should not exceed 18 students; the ratio of students to adults in elementary schools that practice inclusion should be five students per adult; all children should have access to technology for supporting literacy development; parents should be provided with day care when attending IEP meetings; etc.).

Collect the cards, assign participants to groups, and give a stack of cards (face down) to each group. Invite participants to play a game with you. The person who is "It" will draw a card. The person will have one minute to convince the group to vote positively (or negatively) on the issue.

Group members keep track of the different types of strategies each speaker uses (e.g., appealing to their emotions, stating facts, using anecdotes, citing research).

Debrief by having the group review all of the different strategies used for articulating issues. Ask them to rank how effective different strategies were in convincing them to be positively disposed toward the issue.

This activity makes a nice transition to a presentation on how to organize your message for best results. Or, it can be used as a follow-up activity in which participants apply what they have learned about articulating issues.

Application Activity: Sound Bites Rule!

In this activity, participants are ranked by

how well they articulate an issue in three minutes.

Materials: A timer. A bag of potato chips, a bag of cookies, a bag of apples.

Procedures: Three volunteers are selected. Their challenge is to articulate in three minutes or less why the group should vote to have their food item as a snack. Volunteers are given several minutes to identify their message.

The audience is given the tips handout in *Appendix 3D* and asked to rate how well each person did in presenting the message. Scores are tallied and the food receiving the highest vote is distributed.

Application Activity: What's In It For Me?

In this activity, participants review a letter, testimony and/or e-mail message. They determine how well the advocate argued the point.

Materials: Sample letter and/or testimony and/or e-mail (see *Appendices 3H, 3I,* and *3J* for blackline masters). Handouts of the blackline master in *Appendix 3D* for each participant.

Procedures: Show participants one of the messages. Ask them to rate the message in relation to the tips found in the handout (*Appendix 3D*). Repeat the process.

Debrief by having the participants share their reactions.

Influence Strategies

All influence strategies have two things in common—they require the advocate to use proper protocol in the delivery of the message and they assume a clearly defined issue that is articulated. Beyond that, each strategy has its own set of "do's " and "don'ts" for increasing effectiveness.

In this section of the agenda, your responsibility is to help participants explore how they might use standard influence strategies in their lobbying work. Choose one or more of the following techniques for your session(s):

- face-to-face visits
- letters and electronic mail messages
- telephone calls
- public testimony
- media releases and interviews
- ongoing communication

For each technique, we suggest that you move individuals quickly into skill building activities—that is, get participants involved as soon as possible in doing or practicing the technique. For example, if you have selected letter writing, then allow ample time for participants to actually write a letter. Or, if you are working on testimonials, have participants role play delivering a statement. To the extent you can actively engage participants in demonstrating the skills related to each technique, you can ensure greater opportunity for actual application at a later time.

Influence Strategy: Face-to-Face Visits

Participants need to understand the purpose of face-to-face visits and how to maximize their success. Use the blackline master in *Appendix 3K* as a discussion guide.

To help participants apply their knowledge, the following activities are offered. Pick one or more depending on your time and needs of your group:

> ***Role Play.*** Have the group members pick an issue that they have already articulated in a previous activity. Their challenge: To meet with a legislator for five minutes and convince him or her of the need to support the issue. Have participants spend a few minutes (in small groups or partners) working out their strategy. Assign people to role play the politician. Make sure that you time the interaction.
>
> Role play several of these. Debrief

after each scene. It helps to have the audience record their observations in writing. Provide them with a handout of the blackline master in *Appendix 3K*.

Role Play with Motives. As a variation to the previous activity, prepare a stack of index cards on which you have written different personality traits for the politician. Examples include: you are very sympathetic to the issue; you are very hostile toward the issue; you are angry because the last educator you listened to lied about the facts; you want to know what is in it for you if you support this issue; you are bored; you really want to know more about this issue; etc.

As you debrief the activity, focus on what makes it difficult or easy to maintain a professional demeanor during visits.

Re-enactment. If you are working with a seasoned group of advocates, have them recall a really bad visit. Have them either write out or think through the scenario. Using *Appendix 3K* as an observation guide for the audience, re-enact the visit through role playing. It works best to have the author of the scene either play the policy maker or to observe in the audience. Debrief the activity by focusing on what makes it difficult or easy to maintain a professional demeanor during visits.

If time permits, replay the scene. Encourage the person who is role playing the visitor to stay the course in demonstrating appropriate protocol and manners.

What Went Wrong? Ask participants to recall visits which did not go well. For example, CAN member **Susan Fowler** shared the following experience with us. "A colleague and I met with a legislative aide for one of the appropriation committee chairs. The aide informed us she only had five minutes. She instructed us to state our position. While we were answering her, she made no eye contact and did not give us any indication that she was listening. At the end, she stated that the congressman was committed to a course of action quite different from what we requested and walked out. We were unable to engage her in questions before or after we stated our position—it was definitely *not* an exchange."

Encourage participants to discuss strategies they might use for dealing with the encounter. The emphasis should be on brainstorming ideas. Consider role-playing several ideas and critique their effectiveness.

To wrap up this section of the agenda, you might want to encourage participants to arrange for a visit with one of their elected officials and/or aides. Provide them with some technical assistance in how to organize this visit. Assuming that individuals do follow through and make visits, reconvene the group to share experiences.

Influence Strategy: Letters

Participants need to understand the purpose of letters and how to maximize their success. Use the blackline masters in *Appendices 3L* and *3M* as a discussion guide. Make sure that the participants understand the parts of a good letter.

To help participants apply their knowledge, the following activities are offered. Pick one or more depending on your time and needs of your group:

Review Letters. Have ready several letters that participants can review (see *Appendices 3F, 3G, 3H,* and *3I* for samples or use samples of your own). Using the tips presented in *Appendix 3N*, have participants evaluate

the letters. Encourage them to make suggestions for improvement.

Rewrite Letters. Have ready several poorly written letters that participants can review (see *Appendices 3F* and *3G* for samples or use samples of your own). Using the tips presented in *Appendix 3N*, have participants evaluate the letters. Encourage them to make suggestions for improvement. If time permits, have teams of participants rewrite letters.

Write a Letter. In advance, ask participants to bring lap-top computers to the session. Or, if you are able, have your group meet in a room with computers. Otherwise, have plenty of paper and pencils on hand.

Have them pick an issue that they have already articulated in a previous activity. Their challenge: To prepare a letter that can be sent to one of their public officials. The letter can be a request to consider a particular position or it can express gratitude for a previous vote or action. Assign participants to teams and have them write a letter. After they have completed their first draft, have them exchange letters with another group who will provide feedback. Once completed, encourage the group to actually send their letters.

Some session leaders may find that their group needs an intermediary step before writing an actual letter. As a variation, have the group write a mock letter on a meaningless topic—such as a letter to you requesting that the snack for the break be either potato chips, cookies, or apples, or a letter to their superintendent protesting lunchroom duty or bathroom/hall duty or recess duty. Pick a topic that resonates with the group to ensure high energy and enjoyment.

Letter to the Editor. Bring in several back issues of newspapers and have participants, working in small groups, study the editorial pages. If you have back issues of ***Education Week*** or another educational publication that publishes letters to the editor, use them. Encourage participants to apply the guidelines for letter writing to the samples.

If time permits, have the group draft an actual letter to a local newspaper.

To wrap up this section of the agenda, you might want to encourage participants to start a letter writing campaign. Provide them with some technical assistance in how to organize this activity. Assuming that individuals do follow through and write letters, reconvene the group to share experiences. Make sure participants bring to this follow-up session any letters they have received back from their legislators.

Influence Strategy: Telephone Calls

Participants need to understand the purpose of telephone calls to their legislators' offices and how to maximize success. Use the blackline master in *Appendix 3O* as a discussion guide.

To help participants apply their knowledge, the following activities are offered. Pick one or more depending on your time and needs of your group.

Why I Hate Telephones. Many people are uncomfortable making telephone calls to offices. In this activity, participants share their own discomfort making telephone calls.

Ask participants to list five things that make them uncomfortable about making a telephone call to a legislator's office. Tell them to keep these anonymous. Collect the sheets and pass them out to different people. Ask people to share the items on their sheets. If an item is a duplicate, indicate the numbers of

times it was selected. Have the group discuss their reactions.

If time permits, have the group make suggestions for overcoming these inhibitions. For example, have ready a standard line if you dread not having an answer to a question (e.g., "I'm sorry I don't have the answer to your question, but I will get you the answer to that question by the end of the day"); if you fear you will forget something, prepare a cheat sheet with the three most important points you want to make.

Role Play: Hi, I'm a Constituent! Have the group pick an issue that it has already articulated in a previous activity. Their challenge: To role play making a phone call to a legislator's office and sharing the information. As they role play the phone calls, make sure that the players do not face each other—in fact, if you can literally put up a screen to separate them, all the better.

Have the audience observe the role play situation and evaluate it according to the guidelines in *Appendix 30*.

Role Play: Hi, Is There a Live Person on the Other Line? Have the group pick an issue that they have already articulated in a previous activity. Their challenge: To role play making a phone call to a legislator's office and sharing the information.

Using index cards, write out different personality traits for the legislative aide. For example, the individual is shy and doesn't say anything; the individual is in a hurry and wants to get off of the telephone **now**; the individual is personally opposed to your position; the person is eating lunch while you are talking; the person appears to be talking to someone else in the office while allegedly giving you his or her undivided attention; the individual asks you a series of irrelevant questions; the individual consistently interrupts you with statements that imply that he or she is not impressed with what you have to say; the individual makes you feel guilty for taking up his or her time; the person is not at all up to speed on this issue.

Have the person playing the aide pick one of the cards. As they role play the phone calls, make sure that the players do not face each other—in fact, if you can literally put up a screen to separate them, all the better. Have the audience observe the role play situation and evaluate it according to the guidelines in *Appendix 30*. When you debrief the activity, ask participants to focus on their difficulty to communicate and how they overcame it.

I Just Wanted to Hang Up! Ask participants to recall a previous phone conversation they had in which the individual on the other end was not helpful. Ask them to either write out or think through the scenario. Using *Appendix 30* as an observation guide for the audience, re-enact through role playing the telephone conversation. It works best to have the author of the scene either play the policy maker or to observe in the audience. Debrief the activity by focusing on what makes it difficult or easy to maintain a professional demeanor during telephone exchanges.

If time permits, replay the scene. Encourage the person who is role playing the caller to stay the course in demonstrating appropriate protocol and manners.

To wrap up this section of the agenda, you might want to encourage participants to call their public officials. If there is a bill pending, then it makes sense to focus on a real

issue. If there are no particular issues at hand, you might have them prepare a statement that commends the legislator on a past vote or action which can be communicated to the appropriate aide.

Assuming that individuals do follow through and make calls, reconvene the group to share experiences. Some participants will choose to follow-up calls with letters and some will receive letters back from the legislators whom they called. Make sure participants bring to this follow-up session any letters they have either written or received.

Influence Strategy: Testimonies at Public Hearings

Participants need to understand the purpose of public hearings and how to write and deliver testimony. Use the blackline master in *Appendix 3P* as a discussion guide.

To help participants apply their knowledge, the following activities are offered. Pick one or more depending on your time and needs of your group:

Watch a Hearing. Most people will never have been to a hearing at a local level, but especially not at a state or federal level. As a result, most people will probably have some misconceptions about what a hearing is and how testimony looks.

It is helpful to give participants a vision of a hearing. CNN and other news channels often carry pre-recorded or live hearings at the federal level. Some localities also cover school board and city council hearings on cable. Make a video tape of a hearing and show it to participants. Ask them to share their reactions. For example, what surprised them? What more do they want to know about hearings?

If time permits, using the guidelines in *Appendices 3P* and *3Q*, ask participants to rate the speakers at one of these pre-recorded hearings.

Review a Transcript of a Testimony. Using the transcripts in *Appendix 3J* or *3R*, ask participants to evaluate them using the guidelines found in *Appendix 3Q*. Encourage participants to make suggestions for improvement.

Prepare Testimony. Have the group pick an issue that they have already articulated in a previous activity. Their challenge: To prepare written testimony. Assign participants to work in small groups. Once the groups have completed a draft, have them exchange it with another group for review and feedback. Have the groups make final revisions.

If time permits, set up a mock hearing scene. Place tables at the front of the room and assign individuals to act as legislators. Place a podium facing the tables. Invite participants to come up to the podium when called and give their testimony. Invite the audience to evaluate the speakers according the guidelines in *Appendices 3P* and *3Q*.

Guest Speaker. If you know that individuals in your group will be called upon to deliver testimony in the near future, it helps to feature a mentor or role model at your session. Ask someone who has given testimony to share what it was like with the group. Encourage the guest speaker to prepare a 10 to 15 minute (brief) talk about the experience. Give the participants time to ask questions.

To wrap up this section of the agenda, you might want to encourage participants to attend a public hearing and, if appropriate, make a public comment. If there is a local regulation or state bill pending, then it makes sense to focus on a real issue. Should a participant want to make a public comment, then it behooves you to assist that

individual in preparing for the event. Encourage other CEC members and session participants to coach the individual.

Assuming that individuals do follow through and attend a hearing, reconvene the group to share experiences. If participants have made public comment, make sure they bring to this follow-up session their written statements.

Influence Strategy: Media

Participants need to understand how to maximize their success with the media. In this part of the agenda, we have included the following topics:

- Determining if the message is newsworthy (use the blackline master in *Appendix 3S* as a discussion guide).
- Building media networks (use the blackline master in *Appendix 3T* as a discussion guide).
- Plotting your media strategy (use the blackline master in *Appendix 3U* as a discussion guide).
- Writing press releases (use the blackline master in *Appendix 3V* as a discussion guide).
- Being interviewed by the media (use the blackline master in *Appendix 3W* as a discussion guide).

Clearly, you might choose not to cover all of these topics. At the very least, however, participants should understand the role of media and how media people determine whether information is newsworthy or not. Help participants to feel comfortable should they be called upon for an interview or "quotes" by the press.

To help participants apply their knowledge, the following activities are offered. Pick one or more depending on your time and needs of your group:

Is it Newsworthy? Introduce the criteria in *Appendix 3S* for newsworthiness. Have participants pick an issue that they have already articulated in a previous activity. Their challenge: To identify elements of their issue that might be considered newsworthy. Share and discuss.

If you are working with a large group, divide the group into smaller ones. Ask them to complete this task for the same issue. After the groups have completed their task, compare similarities and differences across groups.

Review Newsworthiness. Collect old copies of ***CEC Today***. Divide the group into small teams and distribute copies of ***CEC Today***. Ask teams to select an article and review it according to the criteria for newsworthiness found in *Appendix 3S*. Ask them how they might rewrite the article for their own local newspaper.

Planning a Media Strategy. Using the blackline master in *Appendix 3T* as an overhead, review the different opportunities for networking with the media. Introduce the steps to plotting a media strategy (see *Appendix 3U* for an overhead).

Have participants pick an issue that they have already articulated in a previous activity. Their challenge: To identify elements of their issue that might be considered newsworthy and to chart a media strategy for it. Share and discuss.

Planning a Media Strategy in Your Local Area. Using the steps to plotting a media strategy (see *Appendix 3U* for an overhead), have participants walk through how they might tailor a particular issue for their local press.

Reviewing a Press Release. A sample press release is found in *Appendix 3X*.

Ask participants to review the release and to evaluate it according to the guidelines found in *Appendix 3V*.

Writing a Press Release. Using the guidelines in *Appendix 3V*, ask participants to draft a press release. Engage participants by having them identify an upcoming event that might be newsworthy (e.g., "Yes I Can!" awards; Special Olympics; local educators attending a national meeting at CEC Headquarters; a position statement passed by the CEC chapter or Federation board of directors; etc.). Share and discuss. Encourage the participants to submit it to the press.

Role Playing an Interview. Using the guidelines in *Appendix 3W*, role play an interview. Select a topic (or use one of the topics in *Appendix 3Y*) and ask the audience to evaluate how well the interviewee demonstrated the guidelines. During debriefing, encourage the group to share their views about the difficulty and/or ease with which they can use the guidelines.

Off the Record. Use the blackline master in *Appendix 3Z* to make an overhead. Introduce the concept to the group. Ask if anyone would like to share an experience in which someone betrayed their trust by making a private, "off the record" statement public.

Engage the group in a discussion of why it is hard to keep things secret. Ask them to generate a list of statements that can be used when asked for information that they should not share with a reporter.

Beat the Clock. Have participants write down important issues on index cards. Collect the cards and shuffle them. Introduce the participants to the game, "Beat the Clock."

In this game, one person is the reporter and the other is the expert. The goal is to get as much information as possible from the expert in 3 minutes. The reporter has three objectives: (1) to get enough information for a story, (2) to discover an angle for the story that will attract readers, and (3) get the expert to make an outrageous quote. The audience rates the interviewee according to the guidelines in *Appendix 3W*.

Discuss and debrief the activity. Encourage participants to share their frustration and/or anxiety being interviewed under such conditions. Remind them that practice increases their success.

To wrap up this section of the agenda, you might want to encourage participants to begin networking with their local press. Find out if a paper has an educational reporter. If not, sort through recent papers and identify the author of education-related articles. Often times the reporter who covers school board meetings will also handle other education-related stories.

Provide participants with some technical assistance in how to organize this activity. It is important that they understand that this is not a one-time event—rather, they should cultivate the reporter and think of ways to keep the reporter informed about important issues and successes.

Ask participants to prepare a statement of introduction for the reporter. If the CEC local chapter or state federation is involved, have them prepare a one page statement about CEC and their unit that can be handed to the reporter. Assuming that individuals do follow through and make contact with their press, reconvene the group to share experiences. Make sure participants bring to this follow-up session any materials they prepared for the press or any articles that might have been written as a result of their contact.

Influence Strategy: Ongoing Communication

Participants need to understand that ongoing communication is critical to building positive relationships with lawmakers and their staff. Use the blackline master in *Appendix 3AA* as a discussion guide.

To help participants apply their knowledge, the following activities are offered. Pick one or more depending on your time and needs of your group:

A Personal Invitation. Ask participants to review their upcoming schedules of events or specials in their schools. For example, is there a statewide CEC meeting coming up? Has the high school scheduled a career day where students with disabilities have been included? Suggest that participants consider inviting a public official to the event. Ask them to plan how that individual would be recognized and what your expectations would be for his or her participation (e.g., bring greetings; make a brief speech).

Attending an Event. Ask participants to attend a political reception or hearing or speaking engagement. Ask them to make contact with the policy maker and/or staff. In preparation, have the participants identify strategies for initiating conversation or making a sound bite in a reception line. If time permits, practice the conversation through a role playing scene.

Have the participants report back on their experiences.

Next Steps

In this final part of the agenda, you will need to wrap-up and give the participants a strategy for using the information that you just covered. At the very least, you will need to thank participants for their time, leave them with a way to contact you for further information (see *Appendix 3BB* for cover sheet), and provide them with a tangible way to get involved in advocacy work now (e.g., get involved with CEC Children and Youth Action Network, attend additional training events). You should also distribute CEC membership information and forms (see *Appendix 3CC*).

Following are several sample activities that might also be used to encourage participants to apply the information. You are now at a place where participants should have a working understanding of how to influence their lawmakers. The goal now is to help them "put it all together" into a plan for action.

There are two activities you might use.

- Role playing scenarios that apply different influence strategies (see *Appendix 3DD*).
- Mapping out a political action plan (see *Appendix 3EE*).

Procedures for the activities follow.

Scenarios for Action

In this activity, participants are given one or more of the scenarios (see *Appendix 3DD*) and asked to articulate their issue. (Note: If you are working with a group that is concerned with an actual, pending issue, substitute it for one of the pretend ones.) They will then convey their message in the following formats:

- Face-to-face interview
- Letter or electronic mail message
- Phone call
- Letter to the editor
- Testimony
- Press release

Present and critique their work in the group.

If you are working with a time limit, you might have the group decide which influence strategy is the best choice. Have them focus on developing the message in that format.

Political Action Plan

In this activity, participants actually map out a political action plan. Have the group pick an issue that it has already articulated in a previous activity. (Note: If you are working with a group that is concerned with an actual, pending issue, substitute it.) The challenge: To develop a plan of action.

Provide participants with a blank action planning sheet (*Appendix 3EE*) and invite them to complete it. If you are working with a large group, consider breaking it up into smaller teams.

Influencing the Policy Process

- Involve the policy maker when trying to effect change.
- Make sure your reasons for change are sound.
- Your information MUST be timely and appropriate.
- Present your information in the most effective way possible.

Interpersonal Protocol

- Ask for what you want.
- Be specific in your request.
- Be ready to work hard.
- Find a legislative champion.
- Organize, coordinate, orchestrate.
- Touch all the bases.
- Stay flexible, be opportunistic.
- Keep it simple.
- Assume the perspective of others.
- Build and preserve your credibility.
- Anticipate and deal with your opposition.
- Be prepared to compromise.
- Never burn your bridges.

- Target your efforts.
- Honor the staff.
- Track your progress.
- Be persistent.
- Follow up.

The Cardinal Rule for Every Encounter with Every Community Leader, Politician, and Media Gatekeeper is BE PLEASANT!

Tips for Articulating Issues

- Organize your message as you would a good paragraph—state the lead sentence and follow it with supporting evidence.
- Take into account the background and experience of your audience.
- Frame your message according to the information that already exists in the mind of your audience.
- Humanize facts with actual success stories.
- Associate your message with your audience's basic values and convictions.
- Concisely state the positive benefits of your position.
- Avoid complaints.
- Keep it brief.
- Separate facts from opinions.

Sample Letter

The Honorable Senator X
U.S. Senate
Washington, DC 20510

Dear Senator X:

I am writing to tell you that children with disabilities should not be rejected. You have the opportunity to support children with your upcoming vote—so why not do it?

I have been an advocate for over two months now, and I have never met anyone who really thinks that children should be kept out of classrooms and denied a fair and appropriate public education. Except maybe those people who are greedy and self serving and who want the taxpayers to pay for their children to go to elite private schools where they never have to see an individual with a disability. I don't know if your own children went to private schools, but I didn't and I must say that I am a better person for having experienced diversity throughout my K-12 education. Actually, you can include pre-K as I was a Head Start student in the 1960s.

Children with disabilities deserve a free education along side their friends from the neighborhood. They can contribute much to society, if they are only given a chance. Just think, people like Albert Einstein and Cher have disabilities—no one would want them kept out of classrooms.

The choice is yours! You can do the right thing by voting for children with disabilities. If you don't, you will have to live with yourself.

Sincerely yours,

Jane Doe, Advocate

Would You Send This Letter?

June 11, 1996

The Honorable Randy (Duke) Cunningham
United States House of Representatives
227 Cannon House Office Building
Washington, DC 20515

Dear Duke:

Before I tell you why I wrote this letter, I wanted to let you know that, after seeing the movie "Top Gun," I want to become a Navy fighter pilot!!! What an exciting movie!!! And to think that it was based on your life!!! I think my cousin's brother-in-law's father is a pilot, too. He lives in your congressional district.

Anyway, I just wanted to tell you how thrilled I was that you spoke at CEC's Convention a few months ago. Oh, and I'm sure that everyone else at the Convention liked your speech as well. Having someone of your stature, as the Chairman of the Subcommittee on Early Childhood, Youth and Families, speak to the needs of children with exceptionalities greatly contributed to the overwhelming success of our convention.

I also want to thank you for your remarks concerning special education during the keynote address. Your comments on the national debate surrounding inclusion set the stage for the CEC Delegate Assembly's adoption of a responsible and child-focused inclusion policy statement. Like you, CEC is concerned that during these tight fiscal times funding for special education will become increasingly vulnerable. It is imperative that we educate our children on the basis of their needs and not on budgetary factors.

Furthermore, I wish that the federal government would do something right and follow through on its promise to fund 40 percent of the national average per pupil expenditure for the education of children with disabilities. I'm glad that you feel this way also.

Me and my organization look forward to working with you during the 105th Congress; that is, if the Republicans stay in power! It's evident from your speech that you'll always vote the right way—the CEC way—for students with exceptionalities. Again, thank you for your sincere and motivational address. We were honored by your presence and your deep commitment to children with exceptionalities.

Sincerely,

John Smith
Teacher

Would You Send this E-Mail?

To: opickett@hr.house.gov (Rep. Owen Pickett)
From: jsmith@increase.edu (John Smith)
Re: Education Appropriations
Date: June 27, 1996

Dear Congressman Pickett,

I want you to make sure that Congress increases funding for schools. I've heard that there will be ANOTHER cut in federal monies to schools this year, and I'm really getting tired of it!!! As it is, the school that my son is in can't afford the latest technology that the schools in Roanoke can afford, and that's just not fair!

I'm sure that a lot of other parents feel the same way I do; just ask them! It's a crime, since my son has access to a computer at home, and the Internet, but they don't have them at school. I'm sure you can all come up with a whole bunch of arguments against more money to schools, but since I voted for you last time, you'd better vote the right way this time.

I'm not sure what the bill's name is that talks about education funding, but I'm sure you know what it is. I'll be contacting your office to find out more about this bill, and your position on it, within the next two weeks.

Sincerely,

Tyra Adams
Williamsburg, Virginia

E-Mail

To: opickett@hr.house.gov (Rep. Owen Pickett)
From: jsmith@increase.edu (John Smith)
Re: Education Appropriations
Date: June 27, 1996

Dear Congressman Pickett,

As a constituent in your district, I urge you to oppose H.R.0000, the FY 1997 Labor, Health and Human Services, and Education appropriations bill. Because the bill, in general, freezes funds for education programs at the FY 1996 level, it does not account for the increased number of students that will attend school in the coming year, but it also does not account for costs due to inflation.

I know that you have supported amendments to increase education funding in the past, so when this bill goes to the House floor, would it be possible for you to offer such an amendment, without using other education programs as offsets? If you cannot offer an amendment, would you support one if offered by another Representative?

I look forward to hearing from you concerning this very important matter. Thank you for all of your past support and helping to make education a top priority in the state of Virginia.

Sincerely,

Juanita Morales
Williamsburg, Virginia

Sample Letters

June 11, 1993

The Honorable Mark O. Hatfield
U.S. Senate
711 Senate Hart Office Building
Washington, DC 20510

Dear Senator Hatfield:

On behalf of The Council for Exceptional Children, an organization of over 54,000 educators, researchers, parents, and others who advocate on behalf of children with disabilities and gifted children, I am writing to convey our strong support of the National Education Goal for Parental Participation Act, as well as the Protections for Lobbying Act.

A national education goal for parental participation would serve to stress the need for the involvement of parents in their children's education. A child's first and most important teachers are her or his parents. Schools must strive to involve parents in meaningful and effective ways to ensure the success of a child's comprehensive education. Only parents can create a home environment that will work to sustain and supplement the education received in the classroom. Through a mutually supportive partnership, parents and school professionals can work together to ensure children have the opportunity to reach their individual education goals.

The Lobbying Act would allow CEC and its members to continue to hold dialogues with members of Congress on issues that affect students with exceptionalities, without any fear of repercussion or attacks from certain Congressmen that we're using public money to sway your opinion on vital issues. I'm confident of your abilities to persuade all of your fellow Senators of the benefit of having such a law in place.

CEC commends you for your foresight in sponsoring both pieces of important legislation. The National Education Goals are incomplete without a goal focusing on the need for parental involvement in our neighborhood schools. Thank you for sponsoring the National Education Goal for Parental Participation Act, and the Protections for Lobbying Act.

Sincerely,

Nancy Safer
Executive Director

June 14, 1995

U.S. Senate
Washington, DC 20510

Dear Senator:

On behalf of The Council for Exceptional Children, an organization of over 54,000 educators, researchers, parents, and others who advocate on behalf of children with disabilities and gifted children, I urge you to support H.R. 2118, the FY 1993 supplemental appropriations bill that will be offered on the Senate floor this week.

The Senate Appropriations Committee has reported a FY 1993 supplemental bill that, unlike the House version, does not terminate education programs. The House bill eliminates 14 education programs for a total education cut of $136 million. The cuts would affect programs such as the Student Literacy Corps, Library Literacy Programs, Bilingual Vocational Training, and State Student Incentive Grants. These programs would be terminated to help pay for summer job initiatives and other programs.

As you know, FAPE cannot be fulfilled through an effective IEP, and EBD kids will not receive an appropriate education, if teachers don't have adequate training and if there is not enough funding for all education programs.

The members of the Senate Appropriations Committee have responsibly decided that it does not make sense to cut education programs in order to fund summer job initiatives. We ask you to support the Committee and vote for the Senate FY 1993 supplemental appropriations bill.

Sincerely,

Joseph Ballard
Assistant Executive Director of Public Policy

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Testimony

TESTIMONY OF

PAM GILLET
PRESIDENT OF CEC
THE COUNCIL FOR EXCEPTIONAL CHILDREN
RESTON, VA

BEFORE THE HOUSE SUBCOMMITTEE ON SELECT
EDUCATION AND CIVIL RIGHTS

JULY 19, 1994

Mr. Chairman, and members of this subcommittee, we wish to thank you for this opportunity to convey the views and recommendations of the Council for Exceptional Children as you proceed in your consideration of reauthorization of the Individuals with Disabilities Education Act (IDEA).

The Nation is rapidly approaching the 20th Anniversary of the enactment of P.L. 94-142, the Education for All Handicapped Children Act of 1975 (Part B of the current Individuals with Disabilities Education Act (IDEA)). IDEA has provided children with disabilities with the fundamental right to a free and appropriate public education. As the Congress commences deliberation on the reauthorization of Parts C through H of IDEA, we are given an opportunity to evaluate how well all of the programs in IDEA are serving children with disabilities.

In that context, The Council for Exceptional Children believes that the fundamental rights and protections for children and their families, as well as the basic fiscal and administrative mechanisms contained in Parts A, B, and H of IDEA, are sound, have stood the test of time, and should remain untouched. At the same time, we believe that further refinements and fine- tuning may be in order so that children and their families may be better served in the context of evolving realities of the American school and community and the corresponding evolution known as school reform. CEC also believes that it is incumbent upon all of us to take full advantage of what we have learned in this 20-year period which might lead to improvements in the IDEA.

In essence, CEC believes that in this era of change in the American school, the IDEA must perform a dual role. On the one hand, it must reflect for children with disabilities the basic tenets and directions of national policy in education reform as expressed in the "Goals 2000: Educate America Act." We do not think this will be difficult, for we believe that IDEA, as enacted in P.L. 94-142, was good model legislation for school reform long before school reform was a national topic. At the same time, during this period of intense innovation and change in American education, IDEA must stand as the rock of stability in its declaration of the fundamental and unchanging rights and protections for children with disabilities and their families. We know that the IDEA can and will perform this dual function.

Mr. Chairman, knowing where you and your colleagues are in your deliberations, we have tried to be as specific as possible in our recommendations. Along with the major themes which we have just cited, you will observe that our testimony reflects at least two other major considerations: the need to further strengthen the family/professional partnership that is the essential foundation of the IDEA, and the need to further enhance our focus for children who are culturally and linguistically diverse and their families.

[Remainder of testimony continues here. For a complete copy, please contact CEC. Skip to closing remarks]

Closing

In closing, Mr. Chairman, the Council wishes to state that your proven leadership on disability issues as chair of this House panel assures us that we will have a thoughtful and progressive reauthorization bill from the United States House of Representatives. CEC stands ready to provide you every resource at our command in the preparation of that legislation.

For more information, contact the CEC Department of Public Policy at (703) 264-9498.

Visiting with Policy Makers

- Get to know the policy maker *before* you need something.
- Make an appointment and keep it! Explain the reason for the visit and identify any additional visitors who you will be bringing along.
- Be on time for your meeting. Do not be put off if you are made to wait.
- Introduce yourself. Identify any groups which you are representing. If you are a constituent, let the policy maker know.
- Be polite.
- Be brief.
- Be specific about what you want.
- If the policy maker has already supported your position, express thanks.

- Answer questions truthfully. If you do not know an answer, offer to get it.
- Thank the individual for his or her time.
- Do your homework on the policy maker's past record on your issue prior to the visit. Know which committees and subcommittees he or she serves on.
- Leave a summary of your position with the individual.
- Write a thank you letter after the visit.

Guidelines for Writing Letters

- Address your letter properly.
- Include your return address and let the individual know if you are a constituent. If you voted for him or her, make that statement up front as well.
- Identify the bill you refer to not only with a number, but also with a brief description.
- Identify the group you are associated with (e.g., CEC).
- Be as brief as possible. Get right to the point and state what you want and why.
- Make your letter personal.

- Include personal experiences or news clippings if they are relevant.
- Share any specialized knowledge that you have.
- End your letter by urging the legislator to support your views and by thanking him or her.

Parts of a Letter

- Salutation
- Introductory Paragraph
- Body of the Letter
- Closing

Tips On Writing to Legislators and Public Officials

- Do not use form letters. Don't send a mimeographed, carbon or any other non-original copy.
- If you or your group have stationary, use it.
- A typed letter is not always preferable. However, make sure your letter is legible. Neatness counts!
- Be constructive, not negative. Admit that problems exist and suggest practical alternatives.
- Keep letters short and concise.
- Identify your subject clearly in the first paragraph: include the bill number(s) and legislation.
- Give reasons for your position. If you have specialized knowledge, share it with your legislator.

- Use titles, if appropriate (e.g., Dear Senator ____). Make sure that you have spelled the individual's name correctly. And, never send a copy of a letter addressed to a representative to a senator—or vice versa.
- Use a complete return address on the envelope and in the letter.
- Never threaten to vote against or try to bribe the legislator with your vote.
- If you want the legislator to read your letter, do not criticize or be abusive.
- Request a reply from your legislator outlining his/her views and intended action.
- Keep letters to one subject/issue to avoid confusion.
- Be reasonable. Do not ask for the impossible.

- Do not assume that your legislator knows as much as you do on a particular subject.
- Write your letter when the bill is in committee or subcommittee or when you receive a call for action from CEC Headquarters, your Federation/Division office, or your CAN Coordinator.
- Avoid stereotyped phrases and sentences that give the appearance of a form letter.
- Letters from personal friends of the legislator often receive priority. Use board members and other contacts effectively.
- Sign your letter over your typed name, if appropriate.

Guidelines for Making Telephone Calls

- Formulate what you want to say and practice saying it out loud. If necessary, time yourself.
- Ask to speak to the legislative assistant (L.A.) who handles education issues. State your interest clearly and briefly to the receptionist and you will be put through to the appropriate staff person.
- At the outset, restate your name, town, and the agency or organization that you represent (e.g., CEC, division, federation, chapter, etc.).
- Outline your concerns in a brief, yet orderly manner. State your reasons for support or opposition to the issue. Ask clear and precise questions.

- Do not keep the person on the phone for more than 5 or 10 minutes.
- If you have additional material to send, tell the staff when it will be sent.
- Remember to request a follow-up from the office with the legislator's position on the bill.
- Always try to follow up your phone call with a letter.

Tips for Preparing Testimony

- Identify yourself and your organization.
- State your position.
- Summarize your recommendations first, then explain them.
- Sum up your position.
- Prepare enough copies of your testimony.
- Avoid cliches, wordiness, generalities, and flattery.
- Be clear, concise, and brief.
- Use plain English and avoid jargon.

Preparing Testimony

1. Identify yourself, and, if applicable, the organization you represent.

2. State your position for or against the proposed bill or action.

3. Summarize your recommendations first and then add explanation. Include answers to the following questions.
   - What is your special interest? If testifying as an individual, explain why the proposed bill or administrative rules or action by a governing body would affect the students you serve. If representing a group, explain the group's interest and how you know other members of the group share the opinions expressed in your testimony.
   - How did you arrive at your conclusions?
   - Who will benefit or who will be hurt?

4. Include the following information:
   - Outline of the problem(s) as you see it (them).
   - Solutions you think would be acceptable and alternatives to proposed solutions with which you do not agree.
   - Mention the positive aspects of the issue.
   - Use statistics, charts, and graphs when relevant.
   - In general, testimony should be brief (around 5-7 minutes), stimulating, and overstated in order to excite and energize the legislators about needed programs or changes.
   - Avoid attacking other groups, organizations, individuals, or other educational agendas. This could backfire and have the reverse effect and lower your credibility.

5. Sum up your position at the end.

6. Have enough copies of your testimony available to give to each legislator and to the press.

7. Avoid: cliches, excessive wordiness, vague generalities, flattery.

8. Be clear, concise, and brief. Include examples if relevant. If pertinent, explain how present laws or procedures would be negatively affected by proposed bill or procedures.

9. By all means, use plain English and stay away from jargon used in our field. If you must use a word or phrase that is uncommon, be sure to explain it.

Sample Testimony

TESTIMONY OF

MS. MATTY RODRIGUEZ-WALLING
TEACHER OF STUDENTS WITH BEHAVIORAL AND EMOTIONAL DISORDERS
SUNSET ELEMENTARY SCHOOL
DADE COUNTY PUBLIC SCHOOLS
MIAMI, FLORIDA

AND

MS. CRISTINA HOYO
FIFTH GRADE REGULAR EDUCATION TEACHER
SUNSET ELEMENTARY SCHOOL
DADE COUNTY PUBLIC SCHOOLS
MIAMI, FLORIDA

BEFORE THE SUBCOMMITTEE ON DISABILITY POLICY
OF THE U.S. SENATE COMMITTEE ON LABOR AND HUMAN RESOURCES

MAY 11, 1995

Chairman Frist and members of the subcommittee, my name is Matty Rodriguez-Walling and I am a Behavior Management Teacher at Sunset Elementary School in Miami, Florida, part of Dade County Public Schools, the fourth largest school district in the nation. I have been a teacher for twenty-three years. I am also the recipient of the 1994 Council for Exceptional Children Clarissa Hug Teacher of the Year Award. I am honored to testify before this distinguished panel on the Individuals with Disabilities Education Act. As we near the 20th anniversary of IDEA, I can only hope to convey to you the wonderful impact it has had and continues to have on the lives of children with disabilities. I am both a teacher of children with emotional and behavioral disorders and the parent of a very successful 21 year old son with Down Syndrome who is a product of the quality programs and services provided by IDEA. I have seen the benefits of special education to those I teach as well as with my own son Alfredo.

Teaching children with disabilities requires skill, patience, determination, optimism, and the support of an entire school. Special education provides children with disabilities with the tools and education they need to be independent and successful in adult life. To adequately prepare students with disabilities for "real life," it is crucial that regular education teachers work with special education teachers to promote the integration of students with disabilities into the regular classroom whenever possible. At Sunset Elementary, special education teachers work with other teachers to provide a very comprehensive educational program for children with disabilities. We are fortunate to have the support of an outstanding Principal, Maria Teresa Rojas, who encourages creativity and innovation.

With me today is Ms. Cristina Hoyo, a Sunset teacher who teaches regular education students in the fifth grade. Ms. Hoyo is a graduate of the University of Florida. She has a Masters degree and is certified in middle school mathematics and elementary education. She has been a classroom teacher in the Dade County Public Schools system for six years and has been a grade level chairperson for two consecutive years. Ms. Hoyo and I work collaboratively in order to take advantage of each other's expertise in working with children. We benefit from the support and knowledge each brings to teaching. We believe our students also benefit from the interaction between our classes. The children I teach are often known as the "troublemakers" and feel isolated from their peers. By being involved in projects together, my students and her students become "our students." The barrier is broken and friendships form. The students with emotional and behavioral disorders are able to interact with regular education students and model "good behavior." Ms. Hoyo's students also benefit from the presence of another teacher who can adapt curriculum and is educated in behavior management.

Collaboratively we have worked on a number of committees and programs that benefit both the special education and regular education students. Some of the programs implemented at our school include the "Winning Team Lab," the "Buddy System," "Peer Mediation," the "Mentor Program," and "One-to-One Tutoring." In a nutshell, these programs integrate special education teachers and students with regular education teachers and students so that both groups achieve a better understanding and awareness of the other. We will take a few minutes to briefly describe each of these successful programs so that you will understand the importance of a comprehensive education for all students. One of our roles as teachers is to prepare our students to live

productively in a rapidly changing world. The 21st century is fast approaching and a solid knowledge of technology will be crucial for students to be successful in the workplace. With this in mind, we equipped a classroom with computers, software and other technology and named the classroom the "Winning Team Lab." We also paired students from special education with students from regular education to work together as "buddies." We called it the Winning Team because our philosophy is that "all" students can be "winners" when given the tools to achieve success.

Students attend the Winning Team Lab to work on various math and language arts activities using the computer and software programs as a medium, not only to increase academic skills, but also to acquire social skills. By working together with their buddies, students learn cooperation, turn taking, creativity, and other important competencies that help prepare them to become productive members of society. The project has been so successful that students with emotional and behavioral disorders who initially were too inhibited to 'write' have become comfortable using the word processing programs. With the assistance from their buddies they have been able to produce well written, creative stories, enhanced by graphics, printed and bound into books, and have shared them with the rest of the school. By having students in special education and students in regular education working together, we demystify special education and lessen any stigma attached to "those kids."

Ms. Hoyo and I were also involved in implementing a Peer Mediation program at Sunset Elementary. In this program we teach the students (both regular education and special education) the skills necessary to deal with conflict peaceably and then we train them to serve as peer mediators. At first, no one believed that the kids with behavioral disorders could be mediators because they were always perceived as the conflict makers. The program has been so successful, however, that my students have not only been able to settle their own disputes but have also served as mediators for the entire school. They even transfer the skills they have learned to solve disputes in their own homes.

I have conducted inservice programs for both regular and special education teachers at Sunset Elementary, enabling teachers to learn hands on how mediation works, and how to implement it in their classrooms. The goal, as it is in all of teaching, is to teach classroom skills that children can use in their lives and in their communities. We feel confident that these peacemaking skills have equipped the children with alternative ways of dealing with con-

flict. It is very rewarding to see students with emotional and behavioral disorders who had previously been perceived as a "problem," now become the "problem solvers!"

One of my students, Michael, used to be a very angry child, always in trouble, and lacked interest in school. After being involved as a mediator his entire personality changed. He became interested in school, he had friends in the regular education classes, learned to socialize, started getting A's in his classes, and was eventually mainstreamed into a regular education class. He is now very successful in middle school. Working collaboratively, Ms. Hoyo and I were able to smooth Michael's transition to regular education. Professional collaboration is critical for successfully educating children with disabilities for it enables a greater flow of children with disabilities back into the regular classroom.

Our goal as teachers of students with emotional and behavioral disorders is not only to educate children in order for them to grow academically but also to encourage their social and emotional development. We want to help turn their lives around. In order to assist students, we implemented a behavior management levels system ranging from level one through level four, with level four being the most advanced level. When special education students reach level four they have an opportunity to participate in a regular classroom setting, making it crucial that Ms. Hoyo and I work together to make the transition successful. Because of IDEA, special education teachers have the funds to purchase materials and reinforcers needed by students to reach the highest levels of success.

Another program we have instituted at our school is the Mentor Program. The Mentor Program enables students from a local high school to visit our school regularly to meet with the special education and regular education students. During these meetings, they talk about each other's interests and share things that are happening in their lives. The high school student's role is one of a listener and a friend. They provide moral support for the students and work with them to build trusting and long lasting relationships. Together we designed and coordinated the program. We are proud to say that this too has resulted as an extremely successful and exciting activity.

Ms. Hoyo has also worked with individual students who needed additional attention as a one-to-one tutor. The students' progress has been evident in the quality of work that they produce. She will now share her experiences with you.

Many times in classes for kids with emotional and behavioral disorders there are students of various grades and cognitive abilities. Help and assistance are always welcome, especially since teachers have to deal with both academic difficulties and a variety of behavioral disorders. Collaboration benefits special education students by allowing more one-on-one time with them (two teachers instead of one). It also teaches tolerance and understanding. At the same time, teachers are able to draw on each other's strengths in working together and model the behavior for the students.

I would like to share with you the success stories of three students in particular that I have worked with and who have made an impact in my life. The first of these is Earnest. Earnest is a student whom I first met during the summer of 1992. I was teaching the summer session and he was in my class. During those weeks, I often found myself questioning Earnest's behavior. In trying to keep him on task, I realized he often acted out or made a point of being out of his seat. Whether it was to sharpen a pencil or throw a piece of paper away, Earnest rarely remained seated for an extended period of time. Attention span aside, I became aware of Earnest's inability to do the same work that his peers were doing. It was not that he did not want to work, but rather that he couldn't. It was his fear of the reaction from his peers that kept him from sitting still and asking the questions he needed to ask in order to get started. "Will they laugh at me? Will they think I'm stupid? Will they avoid being friends with me because I'm not as smart as they are?" These are some of the questions that may have been going through his mind and this impacted his ability to do his work.

This is the very reason I'm here to speak to you today. Our educational system has to continue to make strides toward accepting children, all children, and helping children accept each other. By integrating special education teachers and students, schools will build a greater support system for all. Increased awareness will tear down the walls of stereotypes that have been built in the past and will make it possible for students to have an equal opportunity to learn together and respect one another.

I'm pleased to say that Earnest has come a long way. Since that summer when he was in third grade, Earnest was placed in the class for students with emotional and behavioral disorders. When he was in fifth grade, after following the structured behavior management program in the special education class with Ms. Rodriguez-Walling, and receiving counseling, he was able to come back into my class. Through this experience, my students learned about

students with special needs. They built a friendship with Earnest which was mutually satisfying. Earnest took great pride in being a part of my class and it was reflected in the way he carried himself and his increased self-esteem. In addition, he was given more responsibilities and proved he could successfully handle them. He was even in charge of escorting his classmates to my classroom to meet with their buddy tutors and lead them to the computer lab for their activities in the Winning Team Lab. Because of these and many other experiences, Earnest discovered that he was important. He always was, but now he really believed it.

Cotekia and Calvin are two other students that I have worked with closely. Both have had histories of attention seeking behaviors which most would deem unacceptable. Cotekia is being raised by an aunt, and Calvin was born to a drug abusing mother and is being raised by a grandmother. These students, just like Earnest, needed to be given a chance; needed to be believed in; and needed to feel accepted. They also needed structure and individual attention from their special education teachers. They are not bad kids, they are simply special children with special needs; needs that have to be met. I worked one-on-one with each of these children in collaboration with Ms. Rodriguez-Walling. She informed me of their strengths and weaknesses, of the levels they were in according to the behavior management levels system, and we planned all sessions accordingly.

On repeated occasions I was updated by her on how much they had progressed both in academics and behaviorally. Numerous times I walked into their classroom on occasions when I was not even going to work with them, and before I could even say hello, they were within a foot of me with a pencil and notebook in hand to work. Working with these children has been enlightening for me. They are simply three students who have benefited from opportunities which they have been fortunate to have under the Individuals with Disabilities Education Act. Working with their teacher has also been very important since we have learned from each other's strengths. I, too, consider myself fortunate to be a part of the experience. I compel you to continue to support this important legislation which will make these programs and these success stories more widespread, because within each child there lies a potential success story just waiting to come out.

We hope that by sharing with you how special education teachers are working with regular education teachers you can better understand how children with disabilities are benefiting from special education in our schools. The Indi-

viduals with Disabilities Education Act ensures students with disabilities receive a free and appropriate public education that will enable them to live self sufficient, independent lives. Our goal is to provide students with the education and skills they need to succeed after school. At Sunset Elementary School, Ms. Hoyo and I work together to make this goal a reality.

For further information, please contact CEC's Department of Public Policy, at (703) 264-9498.

Is it Newsworthy?

- Timeliness
- Congruence
- Proximity
- Brevity
- Consequence
- Human Interest
- Conflict
- Prominence
- Unusualness
- Inoffensiveness

Build Your News Network

- The Council for Exceptional Children (for *TEACHING Exceptional Children* and *CEC Today*, so that Headquarters can disseminate it nationally to CEC units and national press/stakeholders).
- Local news media.
- Local education/disability associations.
- Local and state education agency vehicles, both special and general education publications.

Building a Media Strategy

To build a strong media strategy, you must know:

- The goal in precise and realistic terms.
- The message in clear, simple terms.
- The target audience.
- The best outlets to disseminate the message and reach the target audience.
- What the audience should do after they have heard the message.
- What, if any, assistance will be needed to accomplish the goal.

Preparing News Releases

- At the top, put the name of your organization and its address, and the name and phone number of the contact person.
- Leave at least two inches of white space before starting the release body.
- Type, double-spaced, on one side only.
- If the release runs more than one page, write [more] at the bottom of the page and begin the next page with a one-word identifier.
- Write "end" or use the "#" at the end of the release.

Tips on Being Interviewed by the Media

- Before the interview (live or recorded), find out as much about the format as you can, especially how much time you will have.
- Before the interview, find out about the audience.
- Ask what questions you will be asked.
- Make your most important point first.
- Provide background information, including facts and figures that might be useful to the reporter (and to your own cause) prior to the interview.

- Keep language simple and direct. Don't use jargon. Jargon puts people off. Speak in short, clear, punchy (e.g., quotable) sentences.
- Emphasize your major points by "flagging" or listing them.
- Maintain control throughout the interview. Be patient, not belligerent; kind, not nasty; helpful, not argumentative.
- Prepare three memorized objectives, or sound bites, that you can always refer to if the interview strays a bit.
- Don't try to be a know-it-all.

News Release

FOR IMMEDIATE RELEASE
Contact: Lynda Voyles
703/264-9478

Special Education Expenditures Are Reasonable and Justified

CEC Strongly Objects to 60 Minutes Report

The Council for Exceptional Children (CEC) the largest professional association of teachers, administrators, parents, and others concerned with children with disabilities and/or who are gifted is disappointed by Leslie Stahl's story, "Special Education," which aired June 9 on CBS's "60 Minutes." Ms. Stahl's report on the costs of special education was misleading and distorted the overall picture relative to educating children with disabilities.

By focusing on a few individual cases where costs were unusually high, the report ignores the real benefits of special education to our economy and to our society.

Prior to landmark changes in law 20 years ago, as many as one million children with disabilities were shunned, ignored, and often denied access to an appropriate education or any education at all. Many were institutionalized or forced to stay at home. And what were the costs? For too many it resulted in underemployment, unemployment, continued institutionalization, or even ending up in the criminal justice system.

Does special education work? What are the REAL costs? Not only does it work, but in the long run the investment in these children actually saves taxpayers money and makes us a more productive society.

Let's look at how educating rather than institutionalizing children with disabilities has impacted our society. In 1974, the year before the passage of the Education for All Handicapped Children Act of 1975, there were 70,655 children and youth with developmental disabilities living in the state institutions. By 1994, as a result of this legislation, the number had fallen to 4001, less than 6% of what it had been just 20 years earlier!

[more]

As children with disabilities have been guaranteed opportunities for education and in-home supports, their numbers within state institutions have continually decreased in every state. Of course these changes have had substantial impact on state budgets. In 1994, the average state institution cost was $82,256 per person. With 66,654 fewer children institutionalized than those in 1974, the savings to states was $5.46 BILLION per year. These savings do not include the savings in welfare, social services, and other costs for students with disabilities who are now able to live independently, be employed, and pay taxes as a result of the special education they have received. If there are such significant savings, why then are school budgets so stretched today? In many instances it is because much of the money saved from not having to provide social, health, and welfare services has been used for other purposes and not passed along to local school budgets. Thus, local schools are assuming the responsibility and costs for services that once were paid by other agencies. Is this fair? Maybe not. But it is unfair to blame students with disabilities for this.

In her report, Ms. Stahl characterized the requirement for a free, appropriate education as a federal mandate, implying that it is an unfunded mandate. The federal government, however, is not "mandating" educational services to children with disabilities; the Constitutionally-guaranteed right of children with disabilities to a free, public education was established by a number of critical court cases in the 1970s. The courts determined that the responsibility for educating individuals with disabilities rests with states and local school districts. The Education for All Handicapped Children Act, now known as the Individuals with Disabilities Education Act (IDEA), was drafted in 1975 partially to help the states with the financial burden of meeting their Constitutional responsibilities. Even without IDEA, states would still be required to allocate the resources to meet their responsibility for providing educational services to children with disabilities.

Providing students with disabilities an appropriate education is an investment that ultimately benefits the individuals, their families, our communities, state and federal governments, and society as a whole. The effectiveness of high quality educational programs in ensuring that students with even severe disabilities become independent, taxpaying citizens has long been demonstrated. Over time the dollars invested in education will both expand the base of taxpayers as well as reduce federal and state outlays for unemployment, welfare, SSI, and Medicaid payments. CEC has long believed that

[more]

the federal government should increase funds to the states to assist states in the costs of fulfilling their obligation to educate children with disabilities.

Further, CEC is advocating for greater sharing of the fiscal costs by public agencies other than the school districts. However, even without additional federal funds, special education is an essential investment for states and communities.

The Council for Exceptional Children is dedicated to seeing that the educational needs of all students, including those with disabilities and those with gifts and talents, are met. It is in the interest of the entire nation to support the education of every child. Our society must foster individual growth and productivity in all of our children regardless of ability or disability and provide them with the educational services they need to attain and lead an adult life of financial independence, dignity, and self-fulfillment.

Our future is in our children and they are well worth the investment!

# # #

Possible Issues

- The debate over state special education funding formulas.
- School bonds.
- State support for Part H program.
- Inclusion.
- Teacher training and licensing.
- School reform efforts.
- Discipline and violence in the schools.
- Interagency collaboration.
- Appropriations.

Off the Record

Don't count on anything you say being truly "off the record." If you never want to see it in print, then don't say it!

Other Methods of Getting to Know Your Legislators

- Attendance at Hearings
- Political Receptions
- Political Dinners
- Speaking Engagements by Legislators
- Setting Up Site Visits

Changing Public Policy

Presented by:

CEC Membership Form

(Following Page)

Appendix 3CC

(continued)

The Council for Exceptional Children

1920 Association Drive
Reston, Virginia 20191-1589
VOICE 1-800-845-6232
TTY 703/264-9446
FAX 703/264-9494

Membership Application

If chapter number is not known, please leave blank. CEC will inform you of your local chapter number. If Student CEC chapter number is not known, please list the full name of your college or university.

1. Address Information

PLEASE PRINT • Use a dark #2 pencil or black ink (ball point or marker)

Chapter #:

FIRST NAME | MIDDLE INITIAL | LAST NAME

☐ HOME ☐ WORK ADDRESS

STREET NUMBER AND NAME OR P.O. BOX AND NUMBER

CITY | STATE OR PROVINCE | U.S. ZIP + 4/POSTAL CODE

AREA CODE | WORK PHONE | AREA CODE | HOME PHONE | AREA CODE | FAX NUMBER

E-MAIL ADDRESS

CEC may make available, at an appropriate charge, the full or partial list of its members to certain carefully selected companies or organizations serving the fields of general and special education. If you do not want your name included, please check this box ☐

2. Yes! I Accept

Please check your combined CEC International and State/Province Dues.

MAILING ADDRESS
U.S. States

	Regular	Student*
GA, ME, TX	$75.00 ☐	$33.00 ☐
FL	$75.50 ☐	$32.50 ☐
DE, KS, NV, VT	$76.00 ☐	$32.50 ☐
CT	$76.00 ☐	$33.00 ☐
AZ, MT, NC, PA, RI, UT, WA	$77.00 ☐	$32.50 ☐
MD	$77.00 ☐	$33.00 ☐
CO, IL, NE, OH, OR, SC, VA, WI, WY	$79.00 ☐	$32.50 ☐
AK, NY	$80.00 ☐	$32.50 ☐
CA	$82.00 ☐	$33.00 ☐
MI, MN	$82.00 ☐	$32.50 ☐
Other States and Provinces	$74.00 ☐	$32.50 ☐

*Student Discount Requirement. To be eligible for student membership, your advisor must complete the following:
I certify that the above named person is a full-time college or university student or a part-time student not engaged in full-time employment as a certified professional in the education profession.
Advisor's Signature _____
University/College _____
Expected Graduation Date _____

Special Paraprofessional, Parent, Retired, and Joint Memberships: Call CEC 1-800-845-6232 for dues information.

3. CEC Gives You More!

Please Check All Divisions You Wish To Join.

Divisions		Regular	Student*
Division for Physical and Health Disabilities•DPHD	A	$12.00 ☐	$ 6.00 ☐
Council of Administrators of Special Education•CASE	B	40.00 ☐	20.00 ☐
Council for Children with Behavioral Disorders•CCBD	C	22.00 ☐	12.00 ☐
Division on Mental Retardation & Developmental Disabilities•MRDD	D	15.00 ☐	6.00 ☐
Division for Children's Communication Development•DCCD	E	15.00 ☐	7.50 ☐
Division for Learning Disabilities•DLD	F	20.00 ☐	13.00 ☐
Division on Visual Impairments•DVI	G	12.00 ☐	5.00 ☐
The Association for the Gifted•TAG	H	20.00 ☐	10.00 ☐
Teacher Education Division•TED	I	20.00 ☐	7.50 ☐
Division for Early Childhood•DEC	J	20.00 ☐	10.00 ☐
Council for Educational Diagnostic Services•CEDS	K	20.00 ☐	12.00 ☐
Technology and Media Division•TAM	L	20.00 ☐	10.00 ☐
Division on Career Development and Transition•DCDT	M	15.00 ☐	7.50 ☐
Division for Research•CEC-DR	N	20.00 ☐	12.50 ☐
CEC Pioneers Division•CEC-PD	P	20.00 ☐	
Division for Culturally and Linguistically Diverse Exceptional Learners•DDEL	Q	15.00 ☐	5.00 ☐
Division of International Special Education & Services•DISES	R	15.00 ☐	7.50 ☐

Only CEC members qualify for membership in CEC Divisions.

4. Compute Total Dues Here

CEC International and State/Province Dues	$
Certificate ($3.00) (Optional*)	$
Dues For Divisions You Wish to Join	$
International Scholarship Contribution	$
Total Dues Payment	$ U.S.

G70696

*An attractive Certificate of Professional Membership is available with your name printed exactly as on this application. To order, enter $3.00 above. Allow up to 6 weeks for delivery.

All dues rates change after June 30, 1997.

5. Payment Options

Auth. #_____
Ref. #_____
For CEC Use Only

☐ Check (in U.S. $) ☐ VISA ☐ MasterCard ☐ Discover

Card #

Signature _____ Expiration

Daytime Telephone Number: Area Code

Please send this form and your payment to:

The Council for Exceptional Children
P.O. Box 79026, Baltimore, MD 21279-0026

Annual membership dues in CEC include $12.00 for subscription to *Exceptional Children* and $15.00 for TEACHING *Exceptional Children*. Annual membership dues in CCBD Division include $6.00 for subscription to *Behavioral Disorders*; annual membership dues in MRDD Division include $5.00 for subscription to *Education and Training in Mental Retardation and Developmental Disabilities*. This information is given in order to meet postal regulations. Please do not use as a basis for payment.

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Scenarios for the Role-Playing Session

- Currently within your school, students who are in the special education program are not allowed to eat lunch with "regular" education kids. You think this policy should be changed. Try to convince your local school board, giving concrete reasons, to vote for a change in the policy.
- You believe that your state's special education law should be amended to require an additional aide in every classroom for every five students with exceptionalities that are subsequently added to the classroom. Convince your state legislator to support this amendment.
- Special education has been extremely effective for the students with exceptionalities in your district. However, additional funds are needed to maintain the level of the program's quality. Convince your Congressman to push for increased funding under IDEA.
- You are chairing a community-wide multi-agency task force to combat the problem of truancy. The task force believes that a city ordinance against truancy is needed. You must convince the alderman and Mayor that an ordinance is necessary. One of the aldermen has stated that the truancy problem is only a school issue, and the police don't have time to be enforcing truancy. State your position.
- The State Superintendent of Education believes that all children, regardless of disability, belong in a regular classroom full-time and has submitted a proposed policy statement to that effect for consideration by the State Board of Education. State your position, either pro or con.

The following role plays are offered by **Rich Lewis** of the Division of Early Childhood, and **Jo Thomason** of the Council of Administrators of Special Education.

- The FY1996 appropriations bill from the House Appropriations Subcommittee on Labor, Health and Human Services, and Education initially contained many devastating cuts that would wipe out funding in many discretionary programs supporting special education. If the bill were to be on the House floor this week, what would you say to convince your Congressman

to vote to restore funding for these programs? (FYI—The programs that were "zeroed out" by the subcommittee were: professional development, innovation and development research, clearinghouses for the dissemination of research information, early childhood education, parent training, technology application and research, special studies, and the Regional Resource Centers. You can reference any of these programs during your role-play to support your position.)

- The House Appropriations Subcommittee on Labor, Health and Human Services, and Education has cut $6.5 million from the FY1995 level for the Javits Gifted and Talented Education Program, leaving the program with $3 million for FY 1996. You know that it's important to challenge students who are gifted, and the subcommittee funding level will force cuts in critical research and demonstration programs on gifted education. How would you convince your Congressman that gifted programs are vital, and that he or she should vote to restore—and even increase—funding for the Javits program?
- Parts of the Individuals with Disabilities Education Act (IDEA) are currently up for reauthorization. The Clinton Administration has already issued its bill, and the House and Senate are working on theirs. You know that mediation has worked in early childhood programs, and you think that the IDEA should be amended to require states to offer mediation to parents. What would you say to your Congressman to get him to support and/or introduce an amendment supporting mediation?

19___ to 19___ Action Plan

Goal _____ Federation/Division _____

Objective _____ Reviewed _____

_____ Date _____

Actions	By Whom	Proposed Completion Date	Evaluation Method

Political Action Plan

19___ to 19___ Action Plan

Goal Adequate funding for special education

Objective Increase state support by one-third over two-year period

Federation/Division _____

Reviewed 8-1-93; 10-1-93; 11-30-93

Date _____

Actions	By Whom	Proposed Completion Date	Evaluation Method
(1) Nurture key legislators	Regional PAN Reps	1 JAN 1993	Test legislative leadership willingness to move
(2) Letter writing campaign	Coalition of federation, parents, other groups	1 FEB 1993	Spot check around legislature
(3) Achieve support of State Superintendent of Education	Meetings convened by and with CEC Federation Officers	1 DEC 1993	Public and/or private endorsement by Superintendent

Module FOUR

Building Coalitions and Networks

There are many ways you can advocate for special education as an individual. But your impact is multiplied when you join others.

As a result of working through activities in this module, participants will:

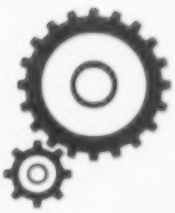
- Understand the purpose of coalitions and how they are formed.
- Explore the role of networking in advocacy work.
- Learn several strategies that can be used by networks and coalitions to influence public policy.

A working understanding of the influence strategies covered in Module 3 will be assumed as you work through this module. Keep in mind that the ultimate goal of this module is to encourage participants to become members of networks—starting with CEC's Children and Youth Action Network (CAN). Therefore, you are encouraged to let participants know repeatedly how they can become involved and apply what they are learning immediately.

Background Information

As an advocate, your efforts will be enhanced when you join with like-minded individuals who share your views about the profession. Most advocates are part of networks, and occasionally will join a coalition.

Coalitions and networks serve two distinct purposes. Networks function on an ongoing basis to keep people with like values linked together and up-to-date on matters that affect their joint interest. On the other hand, coalitions are generally formed on an as-needed basis whenever significant advocacy efforts are required. Sometimes networks will join a coalition for a specific purpose, but will revert back to the informal network structure once the goal has been achieved. Understanding the purpose of both types of structure is helpful as you develop your advocacy skills.



Networks

Networks are a precursor to coalitions, but they can sometimes perform important functions much better than coalitions, because each network participant speaks and acts for him or herself. At its simplest, an advocacy network is nothing more than the commitment, communication, and cooperation of individuals who share a dedication to a higher principle. In the case of students with disabilities and those who are gifted, individuals in the network would be concerned with the fair and equitable educational treatment offered to children and youth with exceptionalities.

Networks have no formal leadership structure. Rather, they are led by those individuals who have the energy, dedication, and skills to reach out to others. The best network members have most of the following characteristics:

- a sense of personal mission that drives them (almost always related to a desire to leave the world a better place than it was found)
- a low propensity for inappropriate outrage
- a willingness to take calculated risks
- integrity and trustworthiness
- the persistence of a long-distance runner
- a good sense of humor
- a capacity for seeing things not as they are, but as they should be
- spontaneity, flexibility, and adaptability
- raw energy and the capacity to harness the energy of others

Successful networks operate at a high level of trust and reciprocity. They rely on a process of faithful exchange, which builds and strengthens the more it is used. Networks excel at developing and introducing new ideas. They perform best those tasks that require individual initiative, quick response, flexibility, risk-taking, and moral intensity.

Strong networks embrace a diverse membership. In forming or expanding an advocacy network that supports students with exceptionalities, you should draw on your long-standing relationships and personal contacts, but you should also think expansively and creatively. For example, you will obviously be familiar with working with groups that serve the special education community. But, there might be less obvious groups to tap as allies that would give more strength to the network by making the key issues more pervasive, such as:

- disability groups
- parent groups
- regular education organizations
- local businesses
- administrators' groups
- teachers' unions
- social service agencies
- chapters and branches of other professional education groups, such as the National Association for the Education of Young Children, American Vocational Association, National Association of School Psychologists
- colleagues from your school or office

There are many places where you might find new allies on special education-related issues. All communities have leaders who affect public policy because they are powerful, well-liked, or both. Sometimes these leaders take a visible public role. But other leaders are just as influential in a much less obvious way.

Advocates who really know their communities will know how to find even these more obscure individuals. You should try to "round up" the key players for their active participation in your campaign, but do not be concerned if they refuse. They might be willing to support your effort at a lower level or at a later date. The least you will have accomplished is advising them of your intentions and your goals, and hopefully, neutralizing any opposition they might have otherwise posed. In the end, the core members of your students with exceptionalities ad-

vocacy network, the real activists, will emerge naturally through their hard work and commitment.

Building and/or Increasing Your Network. One of the most frequently asked questions is, "How do I find people interested in being part of an advocacy network?" You should always be on the "look-out" for individuals who are interested and willing to be involved. Here are some suggestions:

- Contact CEC's Department of Public Policy and request a list of individuals who are in your area who have expressed an interest in advocacy work. Write them a letter of invitation to become involved in your network.

  If you are working on a particular issue, get a list of CEC members living in key legislators' districts. Personally contact them to seek assistance. The New Jersey Federation of CEC has developed an excellent "alert form" for this purpose (see *Figure 11*).

- Seek out your CEC Federation and/or Division CAN coordinator. These individuals have expertise in special education policy and are available to support advocacy efforts in states and provinces.

- Conduct an advocacy workshop in local CEC chapters and other region and state meetings. Encourage people to sign up for more information.

- Write a regular column in your chapter or federation newsletter. Invite people to contact you to become involved.

- Stage a membership drive. Ask every network member to bring at least one or more other people to your next meeting.

- Recruit parent groups. Usually, parents are already advocates and will appreciate having access to legislative information.

- Recruit other organizations who are interested in your cause.

- Recruit colleagues from your school or office.

In addition, remember that you need to nurture the members who are part of your network. Everyone likes to know that their efforts and contributions are appreciated. In addition, individuals who receive recognition for their actions are more likely to stay involved. Be sure to thank people for their help and support. Keep them informed of progress (or lack thereof) and publicly recognize efforts whenever possible.

The CAN Network Can Work For You! The CEC Department of Public Policy works to improve policies affecting individuals with exceptionalities and the professionals who work with them at all levels of government as well as in the private sector. To this end, the Department maintains a network with CEC federations and divisions—the Children and Youth Action Network (CAN)—for influencing policy. CAN is a communication network that is composed of a cadre of individuals capable and willing to affect necessary governmental change.

When presenting information in this module, encourage individuals to become part of the CAN network. There is no better place for individuals to begin sharing their values and skills than in concert with fellow CAN members.

Coalitions

A coalition is a union of people or organizations seeking similar ends. A coalition presents a visible source of information and power, as well as a unified voice to prevent the fragmentation of forces that share common goals. In particularly contentious situations, a coalition can help prevent governmental bodies from pitting one person and/or group against another.

Coalitions are alliances of organizations working together toward a common goal. Coalitions can be formal or informal, tightly or loosely organized. They can be temporary, created for only a limited purpose (such as marshalling support for a specific vote), or they can be permanent, dedicated to long-term, comprehensive reform.

While networks tend to be decentralized,

Figure 11. Political Action Network Alert Form

Attention Colleagues!! Your voice can make a difference!!
This legislation/information pertains to the Exceptional Children that we work with, care for, and/or live with every day. Please take the time to communicate the following to your area legislators. Every letter or phone call counts!

Senate/House Bill Name _____ # _____

Major Talking Points _____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

Please communicate the following to the legislators:

___ Support ___ Do not support ___ Revise the bill

___ Study more carefully ___ Other: _____

_____

_____

Please contact legislators no later than: _____

Thank You!

coalitions are centralized and hierarchical. This is because the participants in a network speak only for themselves, but the participants in a coalition represent entire organizations. In contrast to networks, coalitions provide organizational structure, institutional resources, visibility, and respectability.

Like networks, except in a larger and less intense way, coalitions harness and focus the energies of their constituents and multiply their effectiveness in seeking social change. The great strength of coalitions is their diversity. Some angles of special education issues may appeal more to one group than to another, but in general, it is better to frame the issue for broader, rather than narrower, appeal. Remember that unlike a network, where everyone shares similar viewpoints about the issue, this may not be the case with a coalition. In fact, one of the tradeoffs is that coalitions tend to advance more limited agendas than what individual members might prefer.

A successful coalition respects the needs of its individual member organizations. Each organization should remain free to act and speak for itself outside of the coalition. No one should speak formally for the coalition on issues or positions that have not been cleared and agreed upon. But a successful coalition must have a management and decision-making structure that permits prompt, flexible, and conclusive action.

Coalitions are delicate. They can be as fragile as a family and require the same loving care. At their heart is the willingness and ability to put aside individual differences for the sake of common goals.

There are no permanent friends and no permanent enemies in advocacy. However, through coalitions, you can create strength by uniting unlikely allies and bringing unexpected resources to your campaign. When large organizations with established reputations lend their stability and respect to a coalition, it allows the advocacy groups who are the backbone of the coalition to leverage their resources.

It is important to note that including uncooperative groups in a coalition can be destructive. Successful coalitions are composed of members who are willing to put aside their own egos, and the conflicting needs of their individual organizations, for the common ultimate goal.

Building Coalitions. Coalition-building should be an important prelude to your campaign for bettering the situation of children and youth with exceptionalities. Remember that coalitions do not just happen. They require planning, persuasion, and constant communication. Natural organizational alliances will differ from one community to another and will shift from issue to issue. Before launching into the task of forming a coalition, consider the following questions:

- Who are the people we are trying to influence?
- What are their concerns? Who are their constituencies?
- Do we have support within our own network?
- Who are the other stakeholders?
- Who most likely will support us?
- Who most likely will be against us?
- Who can help us?
- Who can hurt us?

Answers to these questions should help you formulate the blueprint for your coalition.

Begin your coalition by forming an organizing committee to develop a detailed statement of principles and goals. Have members of the organizing committee recruit organizations. Plan a program for the coalition based on incremental steps—e.g., build in ways for your members to experience success. Focus clearly on a single target mission; don't scatter and spread yourselves too thin.

If you feel comfortable doing so, and if the formation of your coalition constitutes a news event, you can hold a joint press conference. This presents the opportunity to:

- Publicly commit participating organizations—including their members and staff—to the coalition.
- Bring media attention that will convey the coalition's purpose and commitment.
- Recruit other individuals and organizations.

Throughout the duration of the coalition's involvement, you should also make sure that all members receive credit for successes. Use joint press releases to show solidarity. Some coalitions have found it helpful to print stationary that includes each group's name, representative to the coalition, and phone number.

Influence Strategies for Networks and Coalitions

Having a plan for communication is critical for the success of your network and/or coalition. One of the hardest tasks is to keep people informed and actively engaged at all times.

Communication

The quickest way to have members lose interest is to ignore them. Members of both networks and coalitions need continuous information about the workings of the group and the issues that brought them together.

At the very least, individuals need a communication channel. As information is retrieved or received, it goes out through prearranged procedures. When disseminating information, the cardinal rule is to keep it short! Try and keep written information to less than a page and verbal messages down to several sentences. Consider the following strategies:

- Mailings. These include newsletters, bulletins, postcards, and short letters.
- Telephone, fax, and e-mail trees.
- Regular meetings.

Clearly, the time-sensitive nature of an event will determine which communication strategy to employ. Also, when relying on others for some aspect of the chain of communication, get their commitment **each** time. Even those individuals with the best intentions get themselves into situations where they "drop-the-ball" and the chain of information is halted. When this happens, not only is the success of the immediate activity impeded, but long term, it can have the affect of disengaging people from future participation.

With large groups, there is always the danger that people will not share all information equally. Logistically, it may be necessary to appoint one individual or group as the "single entry point" (as well as exit point) for all information related to the group. Treat the task as a clearinghouse function—as information comes in, organize it and disseminate it out to the participants for response.

Case Study: OCECD

The following case study was provided by **Lee Ann Derugen**, assistant director of the Ohio Coalition for the Education of Children with Disabilities (OCECD). OCECD is a statewide, non-profit organization dedicated to advancing the educational interests of children with disabilities. **Margaret Burley** is the Coalition's Executive Director.

Organized in 1972, the OCECD is composed of over 46 parent and professional organizations, including the Ohio Federation Council for Exceptional Children, Autism Society of Ohio, Down Syndrome Association of Central Ohio, and the Ohio Protection and Advocacy Association. Any statewide or regional organization whose goals and purposes are similar to those of the Coalition's, and whose membership is composed primarily of parents of children and youth with disabilities, persons with disabilities, or professionals involved in related areas, are welcome to join. Each statewide member organization has two representatives on the OCECD Governing Board, and

each regional member organization has one representative, all serving without compensation. Each representative has only one vote, and no one shall represent more than one organization. Governing Board meetings are held bi-monthly (6 times a year) and are open to the public.

At the Governing Board meetings, member organizations may request that the Coalition consider issues pertaining to their own interests. The Board then decides whether or not the Coalition as a whole will take a stand and/or take action on these issues. There have been times when the Coalition has chosen to remain neutral, in cases when member organizations have differing opinions about an issue. Guest speakers are often brought in to the meetings if more information is needed about an issue. Some of the issues that OCECD has taken action on over the past year include the reauthorization of IDEA, Ohio's state standards revisions, and Ohio's teacher licensure standards.

OCECD, as a federally funded Parent Training and Information Center, is responsible for providing information, training, and assistance to parents of children with disabilities throughout Ohio. To make this support more accessible to parents, OCECD has established 10 offices across the state to assist in this task. All offices are staffed by parents of children with disabilities. Some of the topics the Coalition provides training on include: Rights and Responsibilities Under IDEA; the Individualized Education Program (IEP); Due Process Procedures for IDEA; and Building Parent/Professional Partnerships.

The Coalition has proven successful because all of the member organizations have been able to come together regularly as a group, and talk about each organization's view of an issue. In fact, the Coalition was formed in order for these organizations to share one, strong voice on issues that affect students with disabilities.

- Information on chosen issues—both federal and state-specific—is provided to member organizations on a regular basis, so that they may make informed decisions.
- The organizations recognize the importance of working together to attain a chosen goal. No one organization or group attempts to grab the credit for the success of an endeavor.
- When speaking for the Coalition, member organizations promote the mission of the OCECD.

Further Study

Contact the CEC Department of Public Policy for information on the Children and Youth Action Network (CAN). Ask for information on how you can become more involved in your area, as well as for names of active CAN members in your region.

CEC belongs to a number of coalitions. Contact CEC to find out more about the following coalitions.

Coalitions To Which CEC Belongs

Consortium for Citizens with Disabilities. The Consortium for Citizens with Disabilities (CCD) is a working coalition of consumer, advocacy, provider and professional organizations which advocate on behalf of people of all ages with physical and mental disabilities and their families. Since 1973, the CCD has advocated for federal legislation and regulations to assure that the millions of Americans with disabilities are fully integrated into the mainstream of our nation's life. More than 125 national organizations now actively participate in the Consortium. Some of those organizations, other than CEC, are:

- American Association of University Affiliated Programs for Persons with Developmental Disabilities (AAUAP)
- American Foundation for the Blind (AFB)
- American Speech-Language-Hearing Association (ASHA)
- Bazelon Center for Mental Health Law

- Learning Disabilities Association (LDA)
- National Association of State Directors of Special Education (NASDSE)
- National Parent Network on Disabilities (NPND)
- The Arc
- United Cerebral Palsy Associations, Inc. (UCPA)

The Committee for Education Funding. The Committee for Education Funding (CEF) is a coalition that was founded in 1969 with the goal of achieving adequate federal financial support for our nation' educational system. The coalition is voluntary, nonprofit, and nonpartisan. CEF members include educational associations, institutions, agencies, and organizations whose interests range from preschool to postgraduate education in both public and private systems.

The purpose of the Committee is to provide members of the general public, the Administration, and especially the U.S. Congress, with the information enabling them to better assess the need for funding of federal education programs. The Committee takes positions on federal education appropriations issues that represent a consensus of its membership and then communicates those positions to the Administration and Members of Congress. Some of the organizations that belong to CEF, other than CEC, are:

- American Association of State Colleges and Universities (AASCU)
- American Federation of Teachers (AFT)
- American Vocational Association (AVA)
- Council of Chief State School Officers (CCSSO)
- Council of the Great City Schools (CGCS)
- National Association of State Boards of Education (NASBE)
- National Education Association (NEA)
- National School Boards Association (NSBA)

The Mental Health and Special Education Coalition. This coalition's goal is to ensure adequate and appropriate services and outcomes for children, youth and adults with mental disabilities, both in and out of the school setting. Some of the 44 organizations that belong to the Coalition, including CEC, are:

- American Academy of Child and Adolescent Psychiatry
- Mental Health Law Project
- Bazelon Center for Mental Health Law
- National Association of Private Schools for Exceptional Children (NAPSEC)
- National Association of School Psychologists (NASP)
- Various State Parent Groups, Individuals, and Federal Liaisons

Network and Coalition Building Workshop

This section provides you with ideas for assisting participants in understanding the purpose and workings of networks and coalitions. Specifically, the objectives of the session or workshop are:

- to assist participants in understanding the purpose of networks and coalitions
- to encourage participants to think about how they might become involved in an advocacy network

The session is organized as an one-hour presentation, which can be expanded if time permits. *Figure 12* presents a sample agenda.

Warm-Up Activity

The purpose of the warm-up activity is to find out participants' prior knowledge of and experience with coalitions and networks. In addition to setting the agenda for the session, the following activities are offered as

examples of opportunities you might use to help participants become engaged in activating and sharing their prior knowledge.

What's the Difference?

This activity asks participants to share their knowledge about coalitions and networks.

Materials: The definitions of coalition and network are found in *Appendices 4A* and *4B*. Use the blackline master to make overheads.

Procedures: Ask participants if there is a difference between a coalition and a network. Take a vote. Ask participants to share their reasoning.

As a variation, ask participants to write a list of descriptors for both terms. Compare and contrast in the group.

From this activity, transition to a brief discussion of the definition and characteristics of coalitions and networks.

Hi! I Belong to a Network

Designed as an ice-breaker, this activity serves two purposes: to allow for introductions and to orient participants' thinking to the topic at hand. The activity is facilitator-directed and it should be done at the beginning of the workshop session. As participants introduce themselves, they include a brief statement of what networks and coalitions they currently (or recently) belong to.

Materials: Use the blackline masters in *Appendices 4A* and *4B* to create overheads. You will also need an overhead projector.

Procedures: Put the definitions of coalition and network up on the overhead. Ask participants to introduce themselves as they normally would do (e.g., name, position, where from), but to also include a reference to any networks or coalitions that they belong to. Make sure that you review the definition with the group.

If you are working with a small, manageable group, conduct the activity with the entire group. If working with a large group, you might consider conducting this activity by having participants pair up and share their experiences with each other first, introduce each other and share what they've learned.

This activity makes a nice transition into discussing the difference between the two.

Do I Have What It Takes?

If you are working with an experienced group, then consider this activity to orient them to the topic at hand. In this activity, individuals reflect on their own networking traits.

Materials: Make an overhead or handouts from the blackline master in *Appendix 4C*.

Procedures: Show participants the list of characteristics associated with individuals who are positive contributors on networks. Ask participants to rate themselves according to each trait. Use the following scale:

- 5 points = Very much like me all of the time.
- 4 points = Like me most of the time.
- 3 points = Sometimes like me.
- 2 points = Rarely like me.
- 1 point = Never like me.

Ask participants to share any characteristics which received high or low marks. Discuss.

Why Didn't We Get Along?

If you are working with an experienced group, then consider this activity to orient them to the topic at hand. In this activity, individuals reflect on their past experiences with networks and coalitions.

Materials: Overheads or flip chart paper for recording participants' comments.

Procedures: Ask participants to recall a bad experience and a good experience they had with networks and/or coalitions. Ask them to identify what made it good and what made it bad.

Figure 12. Agenda

Time	Activity	Purpose	Process
5 minutes	Welcome & Introductions	Set positive tone; clarify expectations	Facilitator welcomes participants; introduces self; provides overall goal of the session.
10 minutes	Participant Introductions and Warm-Up Activity	Set positive and interactive tone; activate prior knowledge.	Participants introduce themselves and participate in warm-up; facilitator links activity to content to be presented.
15 minutes	Content Presentation with questions and answers:	To transfer knowledge to participants; provide context for developing and/or joining a network.	Facilitator shares information, either in mini-lecture or informal presentation; encourages participants to apply principles to their own work
25 minutes	Application--Forming a network or coalition	To assist participants in applying their knowledge; encourage participants to take action	Facilitator orients participants to networks or coalition building; engages participants in analyzing own needs; invites participants to become active members of a network.
5 minutes	Closure	"Wrap-up" session & provide opportunity for feedback.	Facilitator thanks participants; encourages feedback; gets a sense of those participants who want to participate further.

As participants share their reflections, record their experiences on an overhead or flip chart paper. After you have made a list of participants' experiences, ask the group to analyze both lists for general "principles." For example, is trustworthiness and commitment a common trend in good experiences? Is lack of communication a theme in poor experiences?

Use this activity as a jumping off point to discussion of coalitions and networks.

Content Presentation

There are several topics that should be covered during this portion of the agenda:

- Definition of network (see *Appendix 4A* for overhead) and definition of coalition (see *Appendix 4B* for overhead). Depending on your choice of warm-up activity, *Appendices 4C* and *4D* also make good references for this discussion.
- Strategies for forming or increasing membership in a network (see *Appendix 4E* for overhead)
- Considerations for building a coalition (*Appendices 4F* and *4G* make good references for this discussion).
- Communication strategies.

Depending on your group, select all or some of these topics. You might also want to add additional topics. In any case, it is important that participants leave this part of the agenda with a clear understanding of the purpose of coalitions and networks.

Next Steps: Application Activities

In this final part of the agenda, you will need to wrap-up and give the participants a strategy for using the information that you just covered. At the very least, you will need to thank participants for their time, leave them with a way to contact you for further information (see *Appendix 4I* for cover sheet), and to provide them with a tangible way to get involved in advocacy work now (e.g., get involved with the CEC Children and Youth Action Network, attend additional training events). You should also distribute CEC membership information and forms (see *Appendix 4J*).

Following are several sample activities that might also be used to encourage participants to apply the information.

Forming a Network

Encourage participants to consider how they might start a network.

Materials: Use the overhead in *Appendix 4D* as a guide.

Procedures: Ask participants to plan a network in their area. Use the questions in *Appendix 4D* as a guide.

Encourage the group to actually establish the network. Track it over time.

Increasing CAN Membership

In this activity, participants consider how they might participate and/or expand the CAN network.

Materials: Fact sheet about CAN (optional).

Procedures: As an orientation, share information about CAN. If participants have been members of CAN, ask them to share anecdotes.

Invite participants to identify areas in which they would like to be involved. In addition, have them suggest ways to expand the network to new members.

Make a plan. Begin by stating a goal (to identify a new CAN member in each district). List strategies that might be used to identify and encourage new CAN members. Select the top strategies and ask for volunteers to follow through. Determine a schedule for the strategies.

If you have time, contact other successful coalitions and ask them to describe how they became organized.

Forming a Phone Tree

In this activity, participants formulate the structure for a phone tree.

Materials: Post-its and chart paper.

Procedures: Ask participants to think about the people in their own informal network who could be called upon in the event of an advocacy activity. Give participants post-its and ask them to write names of key people in the phone tree on each post-it. Add phone numbers where they know them.

You will then need to assemble your phone tree. Decide how many people that each person in the phone tree will be expected to contact.

Take a large sheet of chart paper and begin placing names on the chart paper. Draw lines connecting the people to each other. Review the list.

Encourage the group to actually establish their tree. You will need to assign the master phone tree list to someone (or yourself). Each person is responsible for contacting several people on the phone tree and asking for their involvement and commitment. Ask these individuals to supply the names of three others who would benefit by being part of the network. Fill in phone numbers.

Set a date for the participants to make their calls. Conduct this first phoning as a test run. Reconvene the core group and discuss how it went. Make adjustments on the master phone tree as needed.

As a spot check, you might have participants actually call several random people on the phone tree to check on the efficiency of the process.

Growing the Network

In this activity, participants discuss individuals and/or groups who might be candidates for networking purposes.

Materials: Use the overhead in *Appendix 4E* to guide discussion.

Procedures: Ask participants, working in pairs or small groups, to make a list of individuals who might share similar views about education of children and youth with disabilities.

Discuss the lists and make suggestions for how these individuals might be invited to participate in a network.

Building a Coalition

In this activity, participants practice planning a coalition.

Materials: Make worksheets and overheads from the blackline masters in *Appendices 4F, 4G,* and *4H.*

Procedures: Have the group identify an issue that is of interest to them. Have them then proceed to walk through the steps of planning a coalition.

If you are working with a large group, divide it into smaller groups.

Debrief by sharing plans. Encourage participants to share their logic and reasoning at each decision point.

A coalition is a union of people or organizations seeking similar ends. A coalition presents a visible source of information and power and a unified voice to prevent the fragmentation of forces that share common goals.

Networks function on an ongoing basis to keep people with like values linked together and up-to-date on matters that affect their joint interest. At its simplest, an advocacy network is nothing more than the commitment, communication, and cooperation of individuals who share a dedication to a higher principle.

Desirable Characteristics of Network Members

Do You Have What it Takes?

- A sense of personal mission that drives them.
- A low propensity for inappropriate outrage.
- A willingness to take calculated risks.
- Integrity and trustworthiness.
- The persistence of a long-distance runner.
- A good sense of humor.
- A capacity for seeing things not as they are, but as they should be.
- Spontaneity, flexibility, and adaptability.
- Raw energy and the capacity to harness the energy of others.

Possible Sources for Networking

- Regular education organizations and subject matter groups.
- Administrators' groups.
- Local businesses.
- Teachers' unions.
- Social service agencies.
- Parent groups.
- Chapters and branches of other professional education groups.

Forming a Network

1. What is the purpose of your network?
2. Who is a member?
3. What are the roles and responsibilities of members?
4. What is your plan of action?
5. How will you communicate?

Steps in Forming a Coalition

- Begin your coalition by forming an organizing committee to develop a detailed statement of principles and goals. Establish a common purpose.
- Have members of the organizing committee recruit organizations. Meet with these groups to determine their willingness to work together.
- Elect a leader who is committed to the common purpose and who will put aside any personal agendas for the good of the group.
- Establish ground norms for participation (e.g., voting privileges, funding, procedures).
- Plan a program for the coalition based on incremental steps. Meet on a regular basis.

- Build an implementation plan that focuses clearly on a single target mission; don't scatter and spread members too thin.
- Establish a communication network.
- Hold joint press conferences. Work to ensure that all members receive credit when success is achieved.

Before Forming a Coalition, Ask:

- Who are the people we are trying to influence?
- What are their concerns? Who are their constituencies?
- Do we have support within our own network?
- Who are the other stakeholders?
- Who most likely will support us?
- Who most likely will be against us?
- Who can help us?
- Who can hurt us?

Worksheet for Establishing a Short-Term Coalition*

1. Identify a key issue in your local area or in your state or province.

2. List all of the agencies or groups that may be interested in this issue.

3. Plan how to convene these groups.

4. Develop an action plan for tackling this issue.

* Thanks to Beverley Johns for this worksheet.

Building Coalitions and Networks

Presented by:

CEC Membership Form

(Following Page)

Appendix 4J

The Council for Exceptional Children

1920 Association Drive
Reston, Virginia 20191-1589
VOICE 1-800-845-6232
TTY 703/264-9446
FAX 703/264-9494

Membership Application

If chapter number is not known, please leave blank. CEC will inform you of your local chapter number. If Student CEC chapter number is not known, please list the full name of your college or university.

1. Address Information

PLEASE PRINT • Use a dark #2 pencil or black ink (ball point or marker)

Chapter #:

FIRST NAME | MIDDLE INITIAL | LAST NAME

☐ HOME ☐ WORK ADDRESS

STREET NUMBER AND NAME OR P.O. BOX AND NUMBER

CITY | STATE OR PROVINCE | U.S. ZIP + 4 (POSTAL CODE)

AREA CODE | WORK PHONE | AREA CODE | HOME PHONE | AREA CODE | FAX NUMBER

E-MAIL ADDRESS

CEC may make available, at an appropriate charge, the full or partial list of its members to certain carefully selected companies or organizations serving the fields of general and special education. If you do not want your name included, please check this box: ☐

2. Yes! I Accept

Please check your combined CEC International and State/Province Dues.

MAILING ADDRESS

U.S. States	Regular	Student*
GA, ME, TX	$75.00 ☐	$33.00 ☐
FL	$75.50 ☐	$32.50 ☐
DE, KS, NV, VT	$76.00 ☐	$32.50 ☐
CT	$76.00 ☐	$33.00 ☐
AZ, MT, NC, PA, RI, UT, WA	$77.00 ☐	$32.50 ☐
MD	$77.00 ☐	$33.00 ☐
CO, IL, NE, OH, OR, SC, VA, WI, WY	$79.00 ☐	$32.50 ☐
AK, NY	$80.00 ☐	$32.50 ☐
CA	$82.00 ☐	$33.00 ☐
MI, MN	$82.00 ☐	$32.50 ☐
Other States and Provinces	$74.00 ☐	$32.50 ☐

***Student Discount Requirement.** To be eligible for student membership, your advisor must complete the following:

I certify that the above named person is a full-time college or university student or a part-time student not engaged in full-time employment as a certified professional in the education profession.

Advisor's Signature _____

University/College _____

Expected Graduation Date _____

Special Paraprofessional, Parent, Retired, and Joint Memberships: Call CEC 1-800-845-6232 for dues information.

3. CEC Gives You More!

Please Check All Divisions You Wish To Join.

Divisions		Regular	Student*
Division for Physical and Health Disabilities•DPHD	A	$12.00 ☐	$ 6.00 ☐
Council of Administrators of Special Education•CASE	B	40.00 ☐	20.00 ☐
Council for Children with Behavioral Disorders•CCBD	C	22.00 ☐	12.00 ☐
Division on Mental Retardation & Developmental Disabilities•MRDD	D	15.00 ☐	6.00 ☐
Division for Children's Communication Development•DCCD	E	15.00 ☐	7.50 ☐
Division for Learning Disabilities•DLD	F	20.00 ☐	13.00 ☐
Division on Visual Impairments•DVI	G	12.00 ☐	5.00 ☐
The Association for the Gifted•TAG	H	20.00 ☐	10.00 ☐
Teacher Education Division•TED	I	20.00 ☐	7.50 ☐
Division for Early Childhood•DEC	J	20.00 ☐	10.00 ☐
Council for Educational Diagnostic Services•CEDS	K	20.00 ☐	12.00 ☐
Technology and Media Division•TAM	L	20.00 ☐	10.00 ☐
Division on Career Development and Transition•DCDT	M	15.00 ☐	7.50 ☐
Division for Research•CEC-DR	N	20.00 ☐	12.50 ☐
CEC Pioneers Division•CEC-PD	P	20.00 ☐	
Division for Culturally and Linguistically Diverse Exceptional Learners•DDEL	Q	15.00 ☐	5.00 ☐
Division of International Special Education & Services•DISES	R	15.00 ☐	7.50 ☐

Only CEC members qualify for membership in CEC Divisions.

4. Compute Total Dues Here

CEC International and State/Province Dues	$ ____.__
Certificate ($3.00) (Optional*)	$ ____.__
Dues For Divisions You Wish to Join	$ ____.__
International Scholarship Contribution	$ ____.__
Total Dues Payment	$ ____.__ U.S.

G70696

*An attractive Certificate of Professional Membership is available with your name printed exactly as on this application. To order, enter $3.00 above. Allow up to 6 weeks for delivery.

All dues rates change after June 30, 1997.

5. Payment Options

Auth. # _____
Ref. # _____
For CEC Use Only

☐ Check (in U.S. $) ☐ VISA ☐ MasterCard ☐ Discover

Card # _____ Expiration

Signature _____

Daytime Telephone Number Area Code _____

Please send this form and your payment to:

The Council for Exceptional Children
P.O. Box 79026, Baltimore, MD 21279-0026

Annual membership dues in CEC include $12.00 for subscription to *Exceptional Children* and $15.00 for *TEACHING Exceptional Children*. Annual membership dues in CCBD Division include $6.00 for subscription to *Behavioral Disorders*; annual membership dues in MRDD Division include $5.00 for subscription to *Education and Training in Mental Retardation and Developmental Disabilities*. This information is given in order to meet postal regulations. Please do not use as a basis for payment.

BEST COPY AVAILABLE

Case Study of Advocacy Success—Bananas, Oranges, and Mixed Fruit Salad Save the Day

Beverley H. Johns

In today's atmosphere of block grants, we need to look at an example of how they can be successfully defeated. Our special education coalition—ISELA—fought special education transportation block grants successfully for three years. As part of our mission, we have consistently opposed block grants.

The Chairman of the Illinois House Elementary and Secondary Education Committee and other legislators, at the request of the previous State Superintendent of Education, introduced legislation to "block-grant" special education transportation, general education transportation, and vocational education transportation. The formula was very complex and would have resulted in significantly less money for special education. Each year when the legislation was introduced, we alerted all of our member organizations to call legislative committee members. But that would not have been enough.

I developed unique testimony and a fact sheet designed to grab the attention of the legislators: "Bananas, Oranges, and Mixed Fruit Salad (Transportation Block Grants)." When I gave the testimony the first time in a legislative hearing, every legislator listened—it indeed grabbed their attention. Hearings are usually very serious, but the testimony provided a bit of levity while making a serious point.

The bill did not pass in the General Assembly, but like a bad penny, it came back. The second and third years, the legislation was re-introduced. One legislative staff member said to me "Is that the Bananas, Oranges, and Mixed Fruit Salad legislation again?" It didn't pass the second year; the third year it was introduced but didn't make it to a hearing. It has not been introduced since. We, however, remain on guard and have the testimony ready if it is needed. "Bananas, Oranges, and Mixed Fruit Salad" saved special education transportation in Illinois.

This was an issue of little interest to most legislators and the legislation was so complex that almost no one understood it. Our testimony made the issue interesting, but most important, made the issue understandable.

The testimony follows.

Bananas, Oranges, & Mixed Fruit Salad

HOUSE BILL 503

Let's say you go to your hometown grocery store to buy a banana. Now the State of Illinois is supposed to pay 80% of the cost of the banana and you pay 20%. The State usually doesn't pay all of its 80%, so you have to pay more than 20%, but that's life.

But now the State wants to pay its share of the cost of the banana based on the Statewide average cost of an orange. You might say the cost of a banana in my locale doesn't have much to do with the Statewide cost of an orange. *You would be right.*

Actually the State wants to pay its share of the cost of the banana based on the Statewide cost of a mixed fruit salad. Unfortunately what is *in* the mixed fruit salad varies *all over Illinois*. Also the costs of the bananas, oranges, and apples *vary all over Illinois*. You have to buy locally, you cannot go to the mixed fruit salad outlet store to get a lower price.

But you still have to buy the banana.

We now have a transportation reimbursement system you can understand. It can be improved. As it now reads, HB 503 is **NOT** an improvement.

How could you improve HB 503?

(1) Take special education out of the bill, or *at least* reimburse special education based on the Statewide average cost of special education. Then at least you're comparing your local banana with the Statewide banana. Special education transportation cost per pupil will almost always exceed the statewide average cost per pupil for all transportation because special ed uses specialized equipment (wheelchair lifts, smaller vehicles for children with behavior disorders, etc.), certain students are transported longer distances, and (according to the School Code) "Special education allowable costs shall also include expenditures for the salaries of attendants or aides...while in transit, and for parents and public carriers for transporting special education pupils..."

(2) Put in an adjustment for local cost-of-living. It makes no sense to reimburse on a Statewide average cost when you have to buy locally. Everyone agrees that if the General State Aid formula is changed, there will be an

adjustment based on local cost-of-living, county by county. The Task Force on School Finance produced the figures.

HB 503 as it now reads will hurt special education. If money is not there to provide a service, even if Illinois law says you have to provide that service, school districts will do one of two things: (1) NOT provide service to some children or (2) take money away from other children.

Since new money will be needed to fund the hold harmless line item, if that money is not provided, 33% of school districts across Illinois will lose money (some will lose over 50%). OR money may be taken from the new transportation line item to fund the hold harmless line item, reducing money expected by every school district.

We all need to work to be more efficient, but there is no magic formula to produce efficiency. In the name of efficiency, you can hurt children.